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**Guest-Editors: : Cláudia Henriques and Francisco Serra**  
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# **Journal of Spatial and Organizational Dynamics**

**Tourism, Territories & History**

The Creation of a New Tourist Destination in Low Density Areas: The Boticas Case  
Hélder Lopes, Paula Remoaldo, Vitor Ribeiro, José Cadima Ribeiro and Sara Silva

Cooperation Between Actors for Tourism Development: The Appreciation of Heritage and Cultural Resources in Rural Territories  
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Modelling Tourism Demand in Madeira Since 1946: And Historical Overview Based on a Time Series Approach  
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The Understanding of the Touristic Value of Portuguese Overseas Monuments: The Case of Angola (1959-1974)  
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Civic Participation and Public Spaces: A Key Factor for Sustainable Tourism in Historic Cities  
Martin van der Zwan

# TECHNICAL INFORMATION

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# THE CREATION OF A NEW TOURIST DESTINATION IN LOW DENSITY AREAS: THE BOTICAS CASE

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## ABSTRACT

The goal of this paper is to contribute to identify a set of resources and tourism products, which can enhance the development and sustainability of tourism in the low density municipality of Boticas, located in the north-east of Portugal. Therefore, this paper tries to: i) produce a first analysis of the tourism potential of the municipality of Boticas; and ii) identify different perceptions of different stakeholders regarding the tourism potential of Boticas. To this end, the content analysis of semi-structured interviews conducted in 2014 to local and regional social and political stakeholders were used. Likewise, in 2015 two focus groups were conducted with main local stakeholders. The results highlight three main facts: first, there are unexplored tourism resources with potential to attract certain niches of tourist demand; second, the region has been investing in the diversification of its supply of leisure and recreational activities, as well as available tourism equipment; and third, the region is facing serious difficulties in creating a local and regional stakeholder network in order to provide an integrated promotion of tourism. We conclude by identifying few policy recommendations on development issues for the municipality of Boticas or other rural areas presenting similar constraints.

Keywords: Tourism, Focus Group, Stakeholders.

JEL Classification: Z30, Z32, Z38

## 1. INTRODUCTION

The cultural and natural resources, which are part of the history of a territory, can be harnessed to enhance the tourism activity. In fact, the creation/maintenance of a sustainable tourist destination requires a diversified offer that values the environmental component in order to preserve the cultural attributes, as well as partnerships with public and private stakeholders in tourism development (Ribeiro & Vareiro, 2007). In light of this, the engagement of the local community as well as visitors' perceptions are of utmost importance, enabling the identification of the main existing resources and tourists' interests (Figueiredo & Kastenholz, 2008).

This will increase tourist flows, which will ultimately contribute to: (i) employment creation and growth of the local economy; (ii) mitigate the costs associated with building and

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maintenance of infrastructures (e.g. roads, sanitation, means of communication); (iii) the creation of other sectors of activity directly or indirectly involved in tourism development; (iv) increase the resident's well-being with the introduction of various collective facilities (e.g. pavilions and recreational spaces, outdoor parks, different commercial spaces, public transports); (v) help in the conservation of cultural resources (including the aesthetics of the primary tourist attractions) and in the preservation of natural resources (Hall & Jenkins, 1999). In addition to the return that may be associated with the tourism activity, the focus on this kind of resources and products can be developed with less investment compared with other (mass) tourism strategies involving large businesses and operators (Wilson *et al.*, 2001).

The focus of this paper is on the municipality of Boticas, located in the north-east of Portugal, a territory facing significant social and economic weaknesses. The respective municipal leaders, aware of these difficulties but also of the existing resource potential, together with a research team from the University of Minho decided to verify the tourism potential of Boticas in order to search for answers to the problems experienced, as well as to contribute to the formulation of a strategy with a view to enhancing the quality of life of its population. This research is the first step in this long journey full of choices.

In concrete terms, this study aims to: (i) make a first analysis of the tourism potential of the municipality; (ii) identify the destination profile and the perceptions of several of its socio-economic and political actors; and (iii) contribute to building a strategy for the development of more participatory and sustainable tourism, taking advantage of existing resources and tourism products.

The goals set herein are part of a broader ongoing project (until 2017) of the team of Lab2PT (Landscape, Heritage and Territory Laboratory) of the University of Minho. This project, entitled "Contribution to sustainable tourism in the municipality of Boticas" has the support of the public authorities of the municipality subject of study. In terms of methodology, the first stage of this study is based on a quality-oriented approach, where semi-structured interviews to local and regional actors were conducted (December 2014), as well as two sessions of focus groups with the participation of socio-economic actors and local and regional politicians (September 2015).

This paper is divided into four sections. The first section addresses the issue of sustainable tourism in rural areas. The second part describes the processes inherent to the involvement of stakeholders in promoting sustainable tourism. The following section presents the methodological approach adopted in the case study, which describes the region with its specificities, as well as the procedures adopted in the semi-structured interviews and focus groups. The final section displays the results of the empirical work, which sustain the findings and policy proposals outlined for the tourism development of Boticas, and the overall development of the municipality.

## **2. SUSTAINABLE TOURISM IN RURAL AREAS**

Sustainable tourism practices have gained great relevance after the publication of the book "Ecological Principles for Economic Development" in 1973 (Bramwell & Lane, 1993), although the definition of sustainable development was only popularised from 1987 onwards with the Brundtland report "Our common future" (Brundtland, 1987). Thereafter conditions were created for sustainable practices in various sectors, particularly in environmental development. The United Nations Conference on Environment and Development, organised in Brazil in 1992, enabled the establishment of various agreements, including Agenda 21, between 180 countries (Crosby & Prato, 2009). This (sustainable) development

model, in accordance with the progressive reorientation of economic growth policies and positive environmental reinforcement, gave rise to other relevant concepts: balanced growth; development in the long term; and social equality (Shen *et al.*, 2008). Within the macro trend, the achievement of the Europe 2020 target requires, in the Portuguese case, the Portugal 2020, the promotion of a smart, sustainable and inclusive growth. With a view to establishing guidelines, the 2030 Agenda for Sustainable Development and the 17 goals proposed aim to enhance the transformation of a great number of geographical areas into more sustainable areas in economic, cultural and social terms. Amongst the main lines of action lies the responsible consumption and production of resources, as well as the importance of an alliance between people, partnerships and prosperity, where networking, the win-win cooperation and consolidation of the multidimensional perspective of networks on a local and regional basis are considered. With regard to tourism in rural areas, there is an increase in a more sustainable promotion of culture and communities, as well as a mitigation of the depopulation phenomena.

The sustainable tourism concept emerged from the idea of a necessary interconnection between tourism development, community participation and environmental conservation. This interconnection leads to the increasing need of integrated strategies related to the environment and economy, a concern displayed in various studies by geographers and other social scientists (Hunter, 1997; Hardy *et al.*, 2002; Richards & Hall, 2003).

The significant importance that sustainability has achieved is specifically addressed by the scientific journal of Sustainable Tourism, which is indexed to major international databases. Hall (2011) in a recent study examined the frequency of the concept “sustainable tourism” in abstracts, keywords or titles of papers published in journals with the highest impact factor for the period from 1989 to 2010. He verified a significant increase in studies on sustainable tourism in recent years. Moreover, several non-governmental organisations (NGOs), international agencies and governments have actively been promoting the improvement of economic, social and environmental performance in tourism (Carter *et al.*, 2015).

Despite the increase of studies focused on this issue, three problems persist: (i) the absence of a precise definition, i.e. encompassing all intrinsic conditions of sustainability; (ii) the non-proportionality in the measurement of impact; and (iii) the deficient analysis and monitoring of social and political effects associated to this issue (Buckley, 2012). Likewise, tourism has increasingly been addressing the adoption of sustainable principles, although their practices have consecutively fallen below expectations.

The concept of sustainable development and practices should be based on the interconnection of three pillars: economic sustainability; sociocultural sustainability; and environmental sustainability. The absence of one concept prevents a balancing potential (Hall, 2011). However, the concept of ‘balance’ should be regarded with reluctance as environmental protection is not often compatible with the economic interests inherent in tourism development (Cater, 1995; Hunter, 2002; Sharpley, 2007).

Although economic interests have typically overridden the environmental balance in rural areas, but not only, the key to the success of tourism lies in revealing the particularities of the territories and refuse strategies aimed to attract mass tourism. (Wilson *et al.*, 2001). For this reason, tourism development should invest in the cooperation between resources and involving agents, i.e. search for synergies between different public and private stakeholders. Only then can tourism gain scale and generate added value for the region in question. In light of this, the local community’s perspective in the future tourism development strategy is very important. In fact, not only the local products are considered as basic tourism products available to visitors, but the community itself is also configured as a central attribute of a unique tourist experience (Ribeiro & Vareiro, 2007).

### 3. THE INVOLVEMENT OF STAKEHOLDERS IN CREATING SUSTAINABLE TOURISM EXPERIENCES

Studies conducted in tourism have been constantly stressing the need for the cooperation of stakeholders (interested bodies, institutions, organisations or individuals) in order to achieve successful tourism products (Wang & Fesenmaier, 2007). Other studies focus on the importance of establishing networks and partnerships between them (Dredge, 2006; Scott *et al.*, 2008) for the construction of strategies for products/services and marketing.

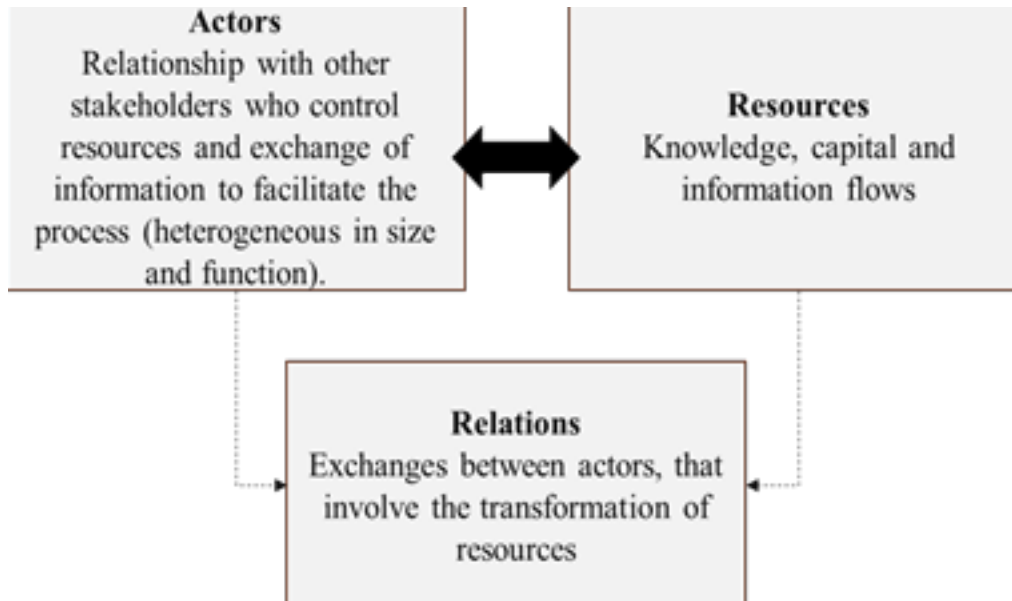
The collaboration of actors in the strategy is dependent on the expectation of receiving long-lasting benefits from the development activity, i.e. the expectation of improving their quality of life. Collaboration between actors should take place at two levels: “inside-destination” collaboration, which corresponds to the design of strategies that lead to the integration of the various actors at local level; and “inside-target” collaboration, which is the integration of regional actors also interested in increasing the tourist industry (Wang & Fesenmaier, 2007).

The network of stakeholders that cooperate in defining territorial strategies in tourism can identify the results that are fundamental to assume the identity of the region (Cox *et al.*, 2014). Moreover, it is possible to create models of governance inherent in the collaborative processes (Jamal & Getz, 1995; Timothy, 1998; Wang & Fesenmaier, 2007; Wang & Krakover, 2008; Beritelli & Laesser, 2011). Due to the complex nature of the product, the informal or formal networks of tourism stakeholders are very dense (e.g. local people, hotels, restaurants, the local government bodies, various sector associations), although they can be distinguished as primary or secondary stakeholders (Jones, 2005; Sheehan & Ritchie, 2005; Bornhorst *et al.*, 2010). The primary stakeholders have regular interactions, holding a strategic significance, while the secondary stakeholders have a role in specific issues where their participation is clearly needed in shaping the implied tourism and strategies (Jones, 2005).

When defining the strategies to be developed in tourist destinations, it is important to bear in mind three basic dimensions (Figure 1): stakeholders, relationships and resources (Scott *et al.*, 2008). Stakeholders establish connections with each other in order to exchange resources, information and activities that facilitate the process. A particular tourist destination can have several stakeholders, and their size and function contribute to the heterogeneity of the former. They work together (formally or informally) and provide direct answers to contribute to the region’s competitiveness. On the other hand, the resources materialise in knowledge, capital and information that are held by actors in one given destination. The relationship between local parties and resources constitutes a third element. Their relationship defines the networks that are usually determined by links between people, objectives and events (Scott *et al.*, 2008).



Figure 1 – Fundamental dimensions present in the development of strategies of a tourist destination



Source: Based on Scott *et al.*, 2008

The process of tourism planning can have multiple stakeholder consultation methods, including drop-in centres, technical group sessions, citizen enquiries, focus groups, interviews, surveys, and meetings, in order to achieve a certain consensus (Yüksel *et al.*, 2005). The selected method for this purpose should be the one that best suits the proposed goals (Yüksel *et al.*, 2005).

The empirical research that has most appealed to stakeholders mainly gathers a set of results and alternatives that can give substance to a collection of identity products of the region, which obviously can arouse the respective attractiveness. For example, in Ponte de Lima (Portugal) Mota *et al.* (2012) refer to the creativity as an enhancement of tourism diversification, based on the variety of available resources in the municipality. On the other hand, the research carried out in the cities of Covilhã and Seia in 2013 concluded as main lessons the need to create a network of tourism stakeholders to establish complementary relationships - something that has been verified in both municipalities (85% of interviewees in the city of Covilhã and 81.6% in the municipality of Seia considered that local actors established cooperative relationships), but not between municipalities (Pais & Vaz, 2014).

Scott *et al.* (2008) studied the network of stakeholders in four Australian destinations with different levels of cohesion and, as a result, they defended the use of the designated split-run technique as the most effective way to determine the success of advertising for tourist destinations. On the other hand, Wang and Ap (2013) understand that the cooperation between government organisations is key to an effective tourism policy. However, in the case study developed in China, stakeholders consider that the centralised system of government posed difficulties to the implementation of tourism policies.

In a study developed by Wilson *et al.* (2001), the focus group was the adopted methodology. It proved the need for an assertive community leadership and strategic planning, coordination and cooperation between stakeholders and local leadership.

Taking into account the studies and empirical evidence provided by literature, our approach to the Boticas case sought to identify the resources perceived by local actors, the existence of complementary relations between them and the *modus operandi* adopted for the definition of strategies for tourism. To this end, and as aforementioned, semi-structured

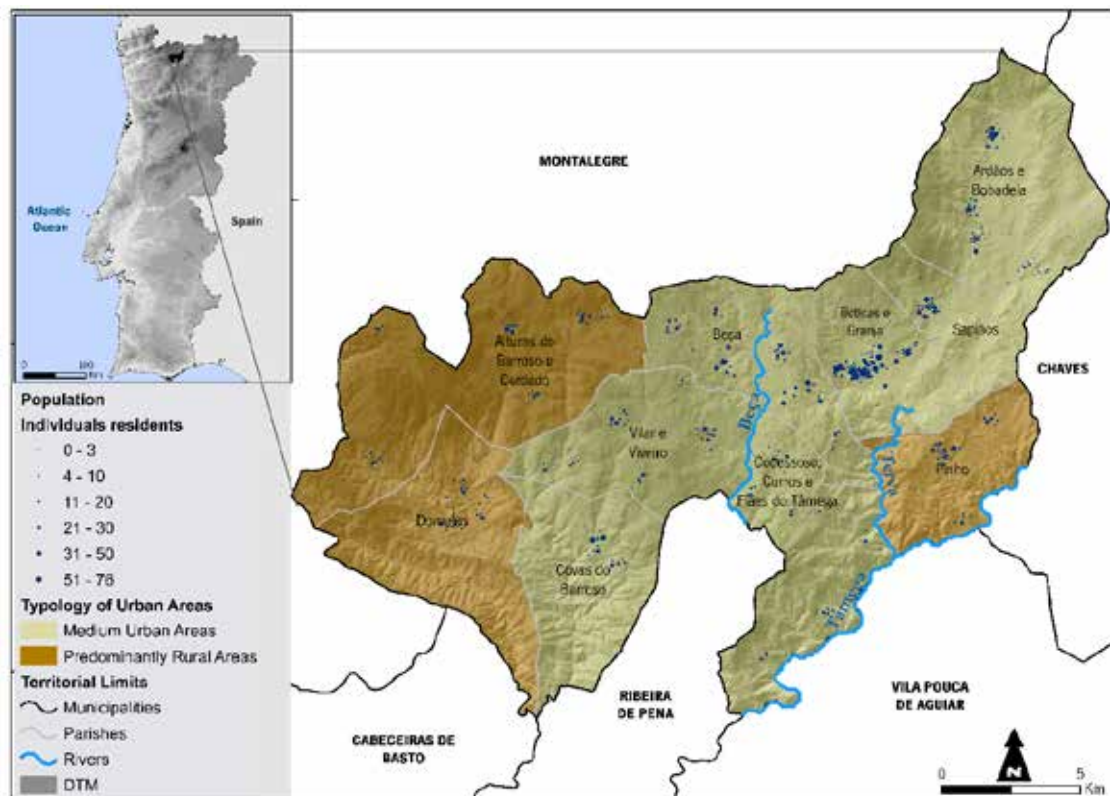
interviews and two sessions of focus groups were conducted with the main local agents of several areas.

## 4. METHODS AND DATABASE

### 4.1 Study context

As aforementioned, the region subject of study is the municipality of Boticas, which is located in the district of Vila Real, in NUTS (Common classification of territorial units for statistics) III of Alto Tâmega, north-east of Portugal (Figure 2).

Figure 2 –Territorial context of the municipality of Boticas: population by subsection, classification of urban areas (T.I.P.A.U. 2014) and digital elevation model (D.E.M.)



Cartographic sources: C.A.O.P. 2013 and Environmental Atlas

Statistics sources: Census 2011 and T.I.P.A.U. 2014 (I.N.E. – National Institute of Statistics)

The municipality is subdivided into ten parishes, which comprise an area of 321.96 km<sup>2</sup>, and according to the Urban Area Typology (TIPAU) for 2014 7 are considered Moderately Urban Areas (AMU) and 3 Predominantly Rural Areas (APR). In 2011 the population of the municipality of Boticas amounted to 5,750 individuals, of which 1,510 inhabitants were located in the Boticas and Granja parish union (central parish of the municipality), corresponding to 26.3% of the resident population. This municipality, as other inland regions in the country, is significantly affected by the concentration of services and activities in coastal regions (Ribeiro *et al.*, 2014).

Boticas has an availability of endogenous resources with a high tourism potential, although they are not being properly exploited, as demonstrated in the document provided

in early 2016 by the Interactive Porto and Northern Portugal Tourism Shop, located in Boticas.

At this moment, due to the embryonic development of tourism in Boticas, the accommodation offer is still sparse, as indicated by the small number of welcome guests. With regard to Hotel activity, the accommodation survey (Inquérito à Permanência de Hóspedes) conducted in 2013 shows that Boticas had 1,329 guests staying for an average of 1.4 night (INE, 2014). However, Portuguese surveys do not include all the accommodation typologies, which in this context could encompass a greater number of tourists staying overnight than registered (Cunha, 2013).

Another weakness in this region's tourism is related to seasonality, which does not facilitate the economic sustainability of this activity for a great part of the year. Between 2011 and 2015, the months that registered greater inflow of visitors were between June and September.

In the municipalities of the interior of Portugal, such as Boticas, climate greatly influences the tourism sector. For example, in June 2012 the region registered its highest average temperature (maximum and minimum). The value was above the average temperature of 1970-2000 (Instituto de Meteorologia, 2012). Accordingly, the number of visits increased compared with the average of the period between 2011 and 2015.

Boticas reached 5,524 visitors in the last year, especially in the months of July and August, reaching an average of 844 visitors/month. Most of the visitors were Portuguese (97.5%) and 2.5% were foreigners - 38.2% were French and 36.0% were Spanish.

It is expected that the the Boticas Hotel Art and Spa - opened in May 2014 - might contribute to increase visitor numbers. Likewise, the municipality has been active in promoting tourism in the region, mainly in the construction of the Nadir Afonso Arts Centre, the Archaeological Park of Terva Valley and the Boticas Park – Nature and Biodiversity. These elements can attract more visitors and mitigate weaknesses identified in the general lines of action in the PENT - National Strategic Tourism Plan (2013-2015) (Ministério da Economia e Emprego, 2012).

#### **4.2 Sources used in the case study**

The case study presented herein arises from a more thorough research. Results of the empirical work must therefore be interpreted as a first approach to the subject of study. The qualitative data was collected from two main data sources: the semi-structured interviews and focus groups. Both the interviews and focus groups were conducted with the main regional and local stakeholders. The selected analytical methods share application advantages, including an increase in flexibility, efficiency and effectiveness (cost-time) for both the interviewee and interviewer (Bristol & Fern, 1996). However, the focus group technique has several additional advantages compared with the semi-structured interviews (Silva *et al.*, 2014). In a focus group, sharing diverse opinions can contribute to a debate with deeper and weighted results, the interviewer has more freedom to respond to stakeholders and even the progress of the debate with peers can lead to the addition of new contributions (Carey, 2015); a fact that does not happen in individual interviews.

However, the disadvantages that may arise from the application of interviews in focus groups must also be taken into account as the costs may be higher (considering the expected results) due to the possible need for additional people for the implementation of the method and/or to ensure the logistics process.

#### 4.2.1 Semi-structured interview

In December 2014 semi-structured interviews were conducted with the main regional stakeholders: ACISAT – Business Association of Alto Tâmega; Porto and Northern Portugal Tourism; Interactive Porto and Northern Portugal Tourism Shop; Nadir Afonso Arts Centre; Town Council of Boticas; and wine cellar Vinho dos Mortos. One stakeholder is part of two institutions (the Interactive Porto and Northern Portugal Tourism Shop and Nadir Afonso Arts Centre). These participants were selected for their active role in tourism activities in the municipality of Boticas.

The interviews were constructed according to six thematic areas, on a top-down perspective. It started with general questions where the interviewees assessed the national tourism context and the general lines of action in the last PENT. Specific issues were then introduced regarding their interaction with the different local stakeholders and the main resources with tourism potential identified in the region. This interview aimed to collect the main strengths and weaknesses of the resources with tourism potential, as well as the elements that help to define a consistent tourism development strategy in Boticas. Finally, the researchers intended to collect data in order to create an image of the tourist destination.

The structure of the interview was not only based on the discourses commonly established for interview surveys, but also on the research work carried out by Bornhorst *et al.* (2010) and Mota *et al.* (2012), amongst others.

In order to identify and correct existing limitations in the survey, a pre-test to five persons was conducted, two of which were carried out in local institutions of other municipalities, located in the northern region. This took place in the period between 31 October and 8 November 2014, and an average duration of 28 minutes was estimated. The interviews took place between 6 and 12 December 2014.

#### 4.2.2 Focus group

The application of the focus group technique stems from an effort developed in partnership with the Town Council of Boticas for the recruitment of relevant stakeholders, and took place on 14 September 2015. The main guidelines were: i) analyse the tourism potential of the municipality of Boticas; ii) identify the profile of Boticas as a tourist destination and perceptions of various stakeholders on tourism development, and ascertain if they are willing to have a more active participation in the development of this type of activity (business development related to the sector); and iii) contribute to tourism development in the municipality of Boticas.

This technique was chosen due to the potential inherent in group participation, where relevant information can be produced resulting from the debate amongst several individuals. These sessions counted on the participation of 21 of the expected stakeholders. The selected stakeholders were politicians, members of organisations and socio-economic and cultural associations, entrepreneurs, people working in fields directly or indirectly related to the tourism sector and prominent members of the local community. The stakeholders were divided in advance into two sessions, where the selected topics (14 questions) were freely discussed. The sessions were conducted by members of the research team. Both sessions lasted 2 hours and 30 minutes.

## 5. RESULTS

The results of the semi-structured interviews and focus groups suggest some lines of action that should be pursued. In particular, we point out i) the need to involve several regional stakeholders and the local promotion of the region, (ii) the opportunity to take advantage of

endogenous resources in tourism, and (iii) the importance of promoting and disseminating the Barrosã identity.

### **5.1 Involving regional and local stakeholders in the promotion of the region**

The relationship between the local stakeholders of Boticas and those from other municipalities located in the same sub-region (Alto Tâmega) is very mediocre. Results show an absence of a close liaison between them and complementary action, which are only concentrated in certain periods of the year. In this regard, we highlight the events organised by the Association of Regional Development of Alto Tâmega (ADRAT), the Intermunicipal Community of Alto Tâmega (CIMAT) and some local authorities [e.g. Boticas Rural Museum, European Centre for Documentation and Interpretation of Castro Sculptures (CEDIEC) and the Archaeological Park of Terva Valley (PAVT)], apart from some private businesses. Moreover, in some specific contexts there are some joint efforts and/or initiatives that take place despite only lasting for the specific event. However, a number of interviewees emphasised the absence of joint strategies that could enhance the region regarding its tangible and intangible assets. In fact, there was a general consensus about the necessity of changing this situation in future events.

Notwithstanding the absence of a broad business community that comprehends the geographical and social context of Boticas, we also concluded that the local government needs to have a synergistic action of tourism promotion and local development.

In order to enhance the fate of pull factors, there is a need to get the commitment of many local actors and, in the case of Boticas, their *“interest is unquestionable against the dominant morphology of the northern hinterland, of low population density, critically raising the sustainability issue of these areas, as well as sovereignty issues”* (senior technician of the Porto and Northern Portugal Tourism and professor at the Portucalense University).

Several limitations regarding some of the aforementioned aspects (geographic and socio-demographic) were repeatedly listed in the interviews and focus groups. It appears that public institutions from several levels and through multi-sectoral actions need to interconnect to provide a diversified offer and promote existing resources, as opposed to isolated actions, which have often resulted in the overlapping of activities and events. Similarly, in order to mitigate tourism weaknesses in events and festivals, it is crucial to promote local entrepreneurship, encouraging the opening of new tourism developments, or simply contributing to the recovery of the heritage and hiking trails.

### **5.2 The empowerment of endogenous resources**

The observation performed in the region showed the existence of historical and cultural heritage of great value, which was recognised by the interviewed stakeholders. However, one of the identified problems was the lack of dissemination of such heritage, regardless of its value.

Overall, we noticed the presence of several exploited physical resources, including built equipment, in recent years, such as the Archaeological Park of Terva Valley, the Boticas Rural Museum, the Nadir Afonso Arts Centre, the European Centre for Documentation and Interpretation of Castro Sculptures, and the Boticas Park – Nature and Biodiversity. In addition, local stakeholders of Boticas consider that the hot springs of Carvalhelhos and their inn are underused. The lack of a competent authority for the management of their equipment, which is not operating, translates into not only a waste of equipment but also a loss of the attractiveness of the municipality.

Intangible assets are exploited in a balanced manner, taking as an example the painting of Master Nadir Afonso and the respective cultural centre, as well as the Gastronomic Fair

of the Fig. On the other hand, there are certain intangible assets that are not currently exploited as they should. With regard to gastronomy, we highlight some dishes, such as cozido barrosão, posta barrosã, fried trout, smoked ham and smoked sausage. This type of gastronomy, not restricted to the municipality of Boticas, is of great importance to the sub-region of Alto Tâmega and especially to Barroso.

Nevertheless, as the town councillor of Boticas stressed: *“the region is geographically vast, but has few people and it is not a very rich region as is Chaves, for example. Its spa is an added advantage. In addition, it is a larger city, and has a cultural and commercial offer larger than Boticas”*. From the cultural point of view, diversity should be fostered so that visits to the municipality do not become restrictive, *“even because I can take a walk, stop in a village, visit the community oven and eat bread; next, I find a house in the village where they are making cozido barrosão, and I stay by the fireplace, warming my hands; I see the cast iron pots and people making smoked pork sausages”* (Secretary-general of ACISAT).

According to the owner of the wine cellar Vinho dos Mortos, there are some potentials, such as Vinho dos Mortos, whose marketing has only been done recently, although there are no regional and national promotion practices that are sustainable and that, in the owner's words, can ensure the establishment of a branding of Boticas.

### 5.3 Strategy to promote and disseminate the *Barrosã* identity

In general, the sub-region of Alto Tâmega lacks tourism promotion strategies, except in the case of Montalegre, where tourism promotion is somewhat rooted in this municipality. Apart from Montalegre, Vila Real has also been taking a few steps towards establishing a tourism strategy.

It makes sense that in the sub-region of Alto Tâmega and Barroso tourism policies that integrate the various municipalities start to emerge as a manifestation of the scarce financial resources and the geographic scale needed to achieve visibility. Therefore, it is imperative that the promotion of tourism is not based on individual actions. In this broader framework, the municipality of Boticas and neighbouring municipalities can work together on their resources and attract a wider public. A summary of the strengths and opportunities, and weaknesses and threats (SWOT analysis) that are intrinsic to tourism in the municipality of Boticas, and which resulted from the conducted empirical research, is presented in Table 1.

Table 1. SWOT analysis of the municipality of Boticas

SWOT Analysis	
Strengths	Weaknesses
<p>Landscape and natural heritage diversity.</p> <p>Preservation of cultural traditions and customs.</p> <p>Existence of various infrastructures in Boticas (Archaeological Park of Terva Valley; Boticas Park – Nature and Biodiversity; European Centre for Documentation and Interpretation of Castro Sculptures).</p> <p>Geographical proximity to Chaves and Spain.</p> <p>Diversity of tourism products.</p> <p>Young entrepreneurship.</p> <p>Commercialisation potential of mineral water of Carvalhelhos.</p>	<p>Deficit in the qualification level of human resources.</p> <p>Low purchasing power.</p> <p>Ageing population and depopulation.</p> <p>Lack of capacity to attract tourists.</p> <p>Undiversified economic base.</p> <p>Lack of complementary activities.</p> <p>Lack of territorial identity.</p> <p>Absence of institutional tourism promotion.</p> <p>Mismanagement of economic resources.</p> <p>Seasonal demand (June to September) and low number of overnights.</p>

Opportunities	Threats
<p>Use of tourism strategy defined by the Intermunicipal Community of Alto Tâmega (CIMAT).</p> <p>Changes in tourists and visitors' motivations in tourism.</p> <p>Barroso Eco museum - the importance of supporting the events and dynamics of the <i>Barrosã</i> culture.</p> <p><i>Barrosã</i> identity.</p> <p>Programme V - Community Support Framework (CSF) based on the qualification of human resources.</p> <p>Macro trend of 2020, where it emphasises inclusive growth.</p>	<p>Inexistence of a complementary culture and joint action.</p> <p>Institutional gaps in tourism activities.</p> <p>Reduced capacity of action of the regional and national stakeholders.</p> <p>Fixing a regional tourism entity (Porto and Northern Portugal Tourism).</p> <p>Maintaining high toll charges on access roads to the interior (e.g. A24 - Guimarães-Ribeira da Pena: € 6.00; Pedras Salgadas - Vidago: € 1.70).</p>

Source: Prepared by authors of the semi-structured interviews and focus groups

As main strengths listed by the stakeholders, we highlight the diversity of heritage and natural landscapes, the preservation of cultural traditions and customs, many of them ancient, and the existence of new infrastructures and equipment, which are intended for cultural events that may energise the city.

However, certain weaknesses were pointed out that must be overcome with a view to boosting the tourism activity in the medium and long term. In fact, stakeholders mentioned the lack of training of human resources, which hinders the implementation of regional policies in tourism, along with an undiversified economic base that jeopardises their ability to meet agents and actions in order to achieve more ambitious strategies.

Nevertheless, some opportunities were recognised, which relate to certain actions that are capable of being developed locally, and others arising from the possible role of the Intermunicipal Community of Alto Tâmega (CIMAT). Moreover, some changes in the motivations of tourists and visitors have also been observed, favouring regions whose tourism practices are not mass-oriented and hold relevant cultural and natural assets.

The main threats faced by these rural areas are the absence of joint efforts and exploitation of complementarities amongst local stakeholders. In fact, the initiatives that arise tend to be quite centralised and monopolised by certain agents that often lobby in the field of public policy.

The strengths, weaknesses, opportunities and threats pointed out must be a central element of the tourism development strategies. In this sense, Boticas' strategy should first pass through its integration in tourism promotion entities that are above the municipality, including the so-called Porto and Northern Portugal Regional Tourism Entity. This will allow it to join resources and acquire the ability to assess the event planning at various levels to promote the area. The definition of common lines of action with regard to tourism scaled to Alto Tâmega and Barroso seems to be the first investment to be done, allowing the anchoring of key attributes that are common to these regions in order to take the first steps towards defining/consolidating an identity image of the tourist destination.

## 6. CONCLUSION

The cultural and natural resources, which are part of the history of a region, may enhance the growth of tourism and territorial development in general. Therefore, this paper focused on the reality of the municipality of Boticas, as a first step towards the establishment of a tourism development strategy of the municipality.

The first stage of this study aimed to: (i) analyse the tourism potential of the municipality; (ii) identify the destination profile and the perceptions of several local actors; and (iii) contribute to the development of a strategy for the development of a more participatory and sustainable tourism by taking advantage of existing resources.

Within this context, a literature review was produced, focusing on the issues of sustainable tourism of rural areas and the role of stakeholders in the configuration of resources and strategies for promoting sustainable tourism in these regions. With regard to data collection, semi-structured interviews and focus groups were carried out with several representatives of the “living forces” of Boticas and neighbouring municipalities.

From the analysis of the conducted interviews and focus groups, it can be concluded that the municipality of Boticas has tourism potential that should be promoted and enjoyed, especially regarding the natural, cultural and wellness spheres. Due to the type of resources and geographical location of the municipality and the very idea of sustainability, we cannot equate this type of product with those mass-oriented products.

The empirical research underlined the weaknesses that are felt with regard to the lack of internal and external coordination of tourism stakeholders and the lack of an association that brings together the municipalities of Barroso and Alto Tâmega for event planning and tourism promotion. This questions the feasibility to effectively promote the region and its resources, and promote/consolidate a target image, despite the many identity elements embodying Boticas and the territory of which it is part.

From the recommendations that emerged from the dialogues held with the actors of the region also resulted the need for some entities, perhaps the municipality of Boticas, to develop some kind of action in terms of promoting entrepreneurship related to products/services that may have tourism potential, and thus enhance the attractiveness of the region and its ability to provide services.

Naturally, this kind of tourism project should be based on its history and cultural and natural resources, while its development should emphasise resource sustainability and environmental preservation, where there are various opportunities for product development, some already in draft stage.

This study presents several weaknesses and we are dealing with the results of a first approach to the potential resources and tourism reality of Boticas. Therefore, the results and the preliminary draft strategy are of exploratory nature. Interpretations of a small number of qualitative elements are questionable, not for their qualitative nature, but they can suffer from bias. Therefore, they should be confirmed by using other data obtained from quantitative approaches. The latter are currently underway with regard to the perceptions of other stakeholders, such as the residents of the municipality of Boticas.

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# COOPERATION BETWEEN ACTORS FOR TOURISM DEVELOPMENT: THE APRECIATION OF HERITAGE AND CULTURAL RESOURCES IN RURAL TERRITORIES

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## ABSTRACT

Framed by the theoretical context concerning cooperation between tourism agents, the present paper aims to contribute for better understanding South Alentejo tourism agents' perceptions on the areas in which they can cooperate for promoting development and competitiveness in the region. Furthermore, the paper also looks at the tourist agents' perception on role that the dynamics of cultural resources play in promotion of development and competitiveness in the region. This paper reports results from a case study conducted in the frame of the thesis developed as requirement to get the PhD in Tourism. Data was gathered by a questionnaire developed for the study from a sample of tourism agents working in the public, private business and associative (non lucrative) sectors.

The study results has indicated that valuation of the existing culture, integrated development of tourism resources and products and organization of promotional activities are the areas considered more relevant for the tourism agents to cooperate among them. In particular, leaders of different sectors agree with the need to cooperate focusing on the valorisation of local and regional cultural resources. This is important because the South Alentejo region has excellent cultural resources that, if strategically used, can provide a major differentiating factor.

Keywords: Cooperation, Actors, Sustainable Development, Cultural Resources.

JEL Classification: Z32

## 1. INTRODUCTION

In recent years, the conservation of natural and cultural resources has become one of the concerns at the global level, contributing to the establishment of compromises among various individual actors, organizations and even nations (Baud-Bovy & Lawson, 2002). From late 70s, as a result of reflections on the negative impacts provoked by the mass tourism, an understanding that tourism development must be planned according to a set of principles has started to be considered a requirement for promoting development. Those principles, at the regional and local context, leads to the need for evaluating the tourism resources and analyzing intervention of the different active agents and actors in the tourism phenomenon in the territory. This is relevant because the relationship among tourism agents, in general, and between agents from the public and private sectors, in particular, is essential for promoting development of tourism destinations, especially the destinations located in peripheral and rural areas (Svensson *et al.*, 2006). However, although considered relevant by

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some experts and practitioners, this intersectoral relationship still suffers some difficulties to be implemented (Inskeep, 1991; Costa, 1996; Hall, 1999; Gunn, 2002).

The planning approaches to tourism development also advocate the need for actors to cooperate in the form of partnerships based on the belief that the tourism organizations and destination areas have the ability to gain competitive advantage by bringing to the process knowledge, experience, capital and other resources held by the various actors (Kotler, Haider & Rein, 1993). Cooperation between tourism agents is undoubtedly a way to contribute for promoting sustainable development in the local and regional territories. This is true because, in addition to promote synergies for development of territories, the concertation of efforts and sharing of common mechanisms among tourism agents allow restoring, appreciating and boosting the (material and immaterial) cultural heritage. This understanding is very important and constitutes a key element for designing and marketing tourism packages and itineraries in rural territories, usually less prepared to conduct, within a cooperative spirit, the recovery processes and promotion of cultural heritage.

The development of tourism in regional and local territories requires mechanisms for identifying and boosting resources to promote and develop tourism products and create the conditions for the territory to become an attractive tourism destination. It is precisely in those aspects that cooperation among the various tourism agents can play a key role in the tourism development process in rural areas. For the same purpose, the territories also need to formulate and promote policy and strategies for valorizing cultural heritage in order to, in a framework of sustainability, strengthen their competitiveness.

The South Alentejo sub-region is an interland territory, strongly marked by rurality, with similar problems comparing with other Portuguese rural areas, namely human desertification and lack of employment. However, it presents a number of highly attractive and differentiating set of features such as the beauty and quality of its natural environment, known as “Alentejo plain land”, and the rich cultural heritage that includes mainly churches, wine production and gastronomy and a traditional way of song (“cante alentejano”), recently recognized as heritage of humanity, just to name a few.

Framed by the theoretical context concerning cooperation between tourism agents, the present paper aims to contribute for understanding perceptions of South Alentejo tourism agents on the areas in which they can cooperate to promote development and competitiveness in the region. In addition, the paper also resumes tourism agents’ perceptions on the relevance of promoting the existing cultural resources and valorising the cultural heritage for facilitating cooperation in the areas they have identified.

## 2. PLANNING, SUSTAINABILITY AND ECONOMIC AND SOCIO-CULTURAL IMPACTS OF TOURISM

The sustainability criteria for tourism require a holistic view of the various effects of the tourism activity on territory which are not only of environmental nature. For that reason, the tourism planning is essential for promoting a balanced tourism development in harmony with the physical, cultural and social resources of any destination territory (Ruschmann, 2008). As stated by Moniz (2006:121), “[the] social, cultural and ecological impacts of tourism can be either of positive or negative nature reason why there is a need to reaffirm the existing synergy between good tourism practices and conservation and management practices of the natural and cultural heritage.”

Based on the large reflections concerning sustainability taken place in the 80 and 90 decades, the growth of tourism has started to be questioned due to the negative impacts that it may cause in the destination territories. Those impacts can be perceived at different

scales such as local, regional, national and international levels and their degree of intensity, whether positive or negative, can vary at different levels. In some cases, “(...) *the impacts are not relevant, but in others, may compromise living conditions or attractiveness of the tourism destinations*” (Ruschmann, 2008:34-37). So, people, in general, and decision makers and tourism experts, in particular, have started perceiving that the tourism activity can not only bring benefits and advantages to local economies but it may also cause damages to destination territories.

In the early days of the mass tourism, impacts of economic nature were the most valued for the local economies given the importance and relevance that this type of tourism has while economic activity. The mass tourism has been considered worldwide as one of the most important economic forces once it originates and promotes income, consumption and development of markets mainly at the local destinations. For this reason, many countries began to consider tourism as a strategic priority for its socio-economic development.

The perception that people have of the importance of socio-cultural impacts of tourism on the target territories is sometimes somewhat limited due mainly to differences in the way the phenomenon is seen and analyzed. These impacts can be positive since the visits, increasing the demand for handicrafts, revitalize the craft skills of the local community, encourage cultural exchanges between different populations, and value cultural and historical heritage. However, the socio-cultural impacts may also be negative for the visited territories due to degeneration of the craft provoked by commercialization, the incentive of pseudo-events by marketing of ceremonies and rituals of the local communities and also by the occurrence of cultural damage to historical sites and loss of cultural diversity (Ferreira, 2005; Wahab & Pigram, 2005; McIntosh *et al.*, 2005; Cooper *et al.*, 2007).

### **3. TOURISM AND SUSTAINABLE DEVELOPMENT OF RURAL DESTINATIONS**

Tourism is seen as an important agent for regeneration, economic development and preservation of isolated rural territories thanks to the attraction elements they have. Thus, the tourism activity may constitute a means of livelihood for local communities and diversification of rural economies (Sharpley, 2002; Jackson & Murphy, 2006; Fotiadis, 2009). In this sense, all efforts concerning promotion of tourism in rural areas should be oriented for developing innovative and differentiated tourism products based on the local resources and characteristics (Ribeiro & Vareiro, 2007) and strengthening strategic partnerships in order to preserve the environmental balance and to valorize the cultural heritage.

In recent times, several factors explain the increased number of destinations based on rural tourism: 1) the decline of agriculture income that requires diversification of economic activities, 2) the promotional activities developed by tourism agencies; 3) the promotion and financing of rural tourism in the framework of rural development programs based on the LEADER approach and the EU Structural Funds; and even 4) the increased awareness of the benefits of tourism activity for organizations involved in environmental management, including national and regional parks (European Commission, 2000). Additionally, there have been major changes in tourism demand behavior with positive impacts on rural tourism, characterized by short stays, great interest in health and active vacations and a greater concern for the environment. Therefore, tourism in rural areas may become an alternative for a more sustainable development by enabling the preservation and valorization of traditions and social relations, allowing rational use of natural resources, generating income and taking advantage of the human competencies at the local level (Silva & Perna, 2002; Sampaio, 2003 as quoted by Pellin, 2005). Furthermore, tourism in rural areas also contributes to environmental protection and conservation of natural, historical and cultural heritage by relying on the management of local and rural areas to its success. In this way, the rural tourism

encourages the management and sustainable use of local rural areas benefiting primarily the local population, directly and indirectly involved in the tourism activities (Campanhola & Silva, 1999). It also constitutes an excellent opportunity in terms of job creation and can be clearly seen as a possibility for economic support and an alternative to the economies of the regions where traditional activities have been losing importance, unable to meet needs of the populations dependent on them (Sharpley, 2005; Sousa, 2006).

Unlike cities and resorts, rural areas tend to be diffuse with limitations in terms of funding and human resources. Usually, these rural tourism destinations are characterized by having a private sector made up of small companies mostly owned and composed by family members and a public sector (municipalities) that need to work together in an integrated manner to develop a viable destination. However, those rural areas, despite not having a clear tourism identity, understand that tourism activity constitutes a great opportunity to support the traditional rural economy through promotion and provision of accommodation and other local services and products to visitors (European Commission, 2000).

Rural tourism destinations can be considered as popular destinations near urban areas that receive large numbers of visitors and in traditionally vacation areas with a good supply of accommodation for visitors. Tourism destinations can also be located in protected areas where tourism activity is integrated with environment practices and characteristics of local economy, or in rural areas characterized by historic towns with a significant patrimony related to the agriculture and rurality. Remote rural areas with strong resources in terms of wildlife and farming activity where agriculture is truly a factor of attraction and areas near by the sea or located in mountains and forests can also be attractive tourism destinations (European Commission, 2000). In view of the diverse features described, a question should be posed. That is, taking into consideration the weaknesses and fragilities of rural areas and the territories located in the Portuguese interland, all the rural regions have conditions for promoting and developing the tourism activity?

A region with a developing potential must have some distinctive cultural, social and natural features which can be used to define its regional identity (Cunha & Cunha, 2005). This is important because the simple availability of accommodation and gastronomy offers do not guaranty the demand capture and not all rural areas are attractive for tourists given they are too remote or do not have sources of attraction in scenic or cultural terms (OECD, 1994). In this context, the tourist destination must have a sufficiently broad and attractive range of opportunities and benefits for the visitor and be located in the vicinity of strong tourism attractions (Kastenholz, 2014).

It is crucial to consider that the development and organization of rural tourism require a significant investment, not always available at local level (Fleisher & Felenstein, 2000), and that the own local communities and businesses may find difficult to adapt themselves to the new role of 'servility' type of service (Fleischer & Piozam, 1997). In addition to the referred aspects, the territories that promote rural tourism should have quality products and services that meet the demands and expectations of tourists. However, the tourism businesses at the rural areas often lack skills and resources for effective marketing of the tourism activities (Sharpley, 2005). Furthermore, developing tourism offers do not always constitute the "lifeline" for the rural territories which, in general, have a very fragile local economy (Butler & Clark, 1992 as quoted by Hall & Page, 2006). For those reasons, the risks associated with the investment opportunities in rural tourism should not be neglected given that it might provoke negative impacts on the local territories and communities (Kastenholz, 2014). In this sense, the concern for the sustainability of tourism in rural areas must be a clear commitment inscribed in the collaboration among stakeholders from the different sectors *"(...) in order to safeguard the integration and the possible valorization of the various components of the*

*tourism experience and obtainment of benefits for the greatest possible number of stakeholders in the long run* “(Kastenholz, 2014:3).

#### **4. COOPERATION FOR DEVELOPMENT OF RURAL DESTINATIONS AND APPRECIATION OF CULTURAL HERITAGE**

Since tourism activity has a strong impact on the development of local territories it can be said that this economic activity is closely interrelated with the local development process. In fact, when the social, economic, cultural and environmental issues are worked at the local level, the tourism activity merges with the local development process (Cunha & Cunha, 2005). In this sense, the formulation of tourism policies and strategies, regardless of the intended goals and ambitions and / or motives that are behind the programs, projects and activities to be undertaken, should take into account the dimensions of social, economic, cultural and environmental nature. Appropriate and effective local development strategies require actions to promote the sustainability of territories and the integration of all sectors of activity and, therefore, sectoral investment programs must first obey “(...) *the preservation policies concerning the cultural, artistic, historical, natural, documentary and landscape patrimony of the country*” (Beni, 1997:103). In this sense, all tourism-related actors should coordinate their actions with public and private entities in order to promote the conservation and sustainability of national cultural and natural resources (Beni, 1997).

The relationship of the cultural and social conditions suggest a strong presence of the social dimension in all events organized by local actors. Thus, the most significant is the social content of the programs in terms of democratization of access and range of values, the more lasting will be the results achieved and, in this regard, tourism activities should be geared to “(...) *encouraging creativity, the arts and social events, craft and folk and increasing the number of people affected by this policy and the areas concerned by it or benefit*” (Beni, 1997). Being the economy the last condition, the programs and projects should activate and streamline “(...) *the enterprises operating in the sector, with broad support to trade, the hotel industry, the specialized production and artisan, to transporters, the travel agencies and any other valuable initiatives in the sector*” (Beni, 1997:104). In the frame of this approach, the intersectoral relationships contribute clearly to improving the quality of socio-cultural aspects (eg. historical heritage, theaters, parks and recreational areas) (Zrilic & Peric, 2001).

The tourism is a fragmented industry based on small business units, aspect clearly more evident in rural areas. This feature of tourism makes it difficult for the small businesses' managers to control all the tourist system components as well as the elements and stages of the decision process. For this reason, cooperation among local tourism stakeholders assumes significant relevance in facilitating tourism agents to overcome the difficulties that arise in the development of the tourism sector, aspect clearly positive mainly when local tourism agents want to open the activity to new markets (Keller, 2008).

The associativism and networks between companies and organizations and territories are the most common forms of collaboration and cooperation. Relations arise within regions stably and joint efforts are successful. This allows for transactions between public and private actors on the basis of agreements (more or less formal) working together the partners in development issues and sharing a kind of equity in their relationships. In developed countries in particular, much of the development agencies use this process, which in the end is organizations based on trust between the parties and targeted at very specific goals (Vázquez-Barquero, 1995). For example, as part of cultural tourism already identified since the 1980s and 1990s, some partnerships in order to develop tourism in historic centers (eg. Britain, seaside resorts in southern Europe). In this context there is clearly an intersectoral

involvement to support the development of cultural activities and invest in the protection and enhancement of heritage (Ferreira, 2004), to complement the other supply components (eg. beach) that were in decline.

The associativism and networks between firms and other organizations linked to the tourism sector are the most common forms of collaboration and cooperation in rural areas. This kind of relationship arises stably in local territories showing that joint efforts are successful. This way of working permits to conduct transactions between public and private actors on the basis of (more or less formal) agreements under which the partners work together to develop products and solutions to problems arising in the course of the tourism development process. A large part of the development agencies and structures of the so-called developed countries use this approach based on trust between the partner parties and oriented towards very specific targets (Vázquez-Barquero, 1995). For example, in the context of cultural tourism, some partnerships were established in the 80s and 90 in Britain and in seaside resorts in southern Europe in order to develop tourism in historic centers. In these circumstances, an inter-sectoral involvement among different actors was found as adequate strategy to support the development of cultural activities and invest in the protection and enhancement of cultural heritage (Ferreira, 2004) to complement the other components of tourism offers that were in decline at that time as was the case of beach resorts.

## 5. STRATEGIES FOR TOURISM DEVELOPMENT - THE IMPORTANCE OF THE HERITAGE (ALENTEJO)

The National Strategic Plan for Tourism (PENT) constitutes a document of unquestionable relevance for the development of a national strategy for tourism and, consequently, for the formulation of tourism strategies at regional and local level. Given the subject discussed in this article, from the eleven measures identified in the document, the measures 4 and 7 should be emphasized. The Measure 4, related to the development of products, recommends development of strategies aiming at *“developing and structuring a multiproduct offer in the various regions (...) investing on an innovative structuring of cultural and religious tourism.”* The Measure 7, related to the experiences and characteristics of locals and regions, points out to the differentiation of local and regional territories in terms of traditional cultural experiences and contents through *“developing and innovating Portuguese traditional contents and experiences which constitute factors of tourism differentiation and are the basis of remarkable and genuine experiences.”* On the other hand, in terms of cooperation, networking and partnerships, the Measure 5 of the PENT advocates the need and importance for promoting intersectoral approach in tourism development and points out to *“take the Regional Tourism Entity (...) as the structuring engines and enrichment of the local tourism offers, promoting the involvement of the business community and the public agencies (...)”* (2005:10-11) for the purpose of improving the products supported by distinctive tourism resources of the territories.

The National Strategic Plan for Tourism (PENT) clearly emphasizes the importance of a tourism development model for the country based on sustainability. In fact, one of PENT axes is based on the need to (1) preserving and enhancing the historical and cultural heritage with a strong focus on the use of local cultural elements in the architecture, cuisine and decoration; (2) encouraging and supporting the recovery of monuments, museums, and other local historical landmarks; (3) incorporating the local history, traditions and culture in regional and local tours and events, and (4) not least, promoting the local culture and contents (PENT, 2005).

Taking into account the Alentejo region, the PENT, in terms of strategic products, advises that the region must direct their efforts and investment in the *Touring* - cultural



and religious tourism and for the food and wine (gastronomic tourism and wine tourism) (PENT, 2005). This orientation is very relevant for the Alentejo's tourism development given that the Alentejo region has a varied and differentiated set of tourism resources that include the cultural heritage elements from which must be highlighted the historical (urban-monumental) heritage, the sacred art heritage, the ethnographic patrimony and the folk art (PORA:16). "The Regional Operational Programme of Alentejo (PORA - 2014-2020)" is one of the regional documents with relevance for the tourism development in the Alentejo given that it was developed based on a very detailed survey of local realities including strengths and opportunities for development of the territory. Alentejo region has 15 museums integrated into the Portuguese Network of Museums and its cultural assets include 214 national monuments, 351 buildings of public interest and 54 properties of municipal interest, all classified as cultural patrimony (PORA:16). This cultural offer constitutes in fact a considerable added value for structuring economic activities and above all, to designing attraction program for visitors, in general, and tourists seeking destinations with a strong identity, in particular. However, the region has a number of weaknesses in the area of inventory, classification and valuation of the cultural patrimony reflected in the insufficient availability of assets for public enjoyment (PORA:16) which have to be surpassed.

The Strategic Document for Alentejo Tourism (2014-2020) indicates clearly that one of the strategic priorities for the tourism development in Alentejo is managing the tourism destinations by reinforcing skills and competencies through cooperation among tourism agents. That cooperation should take into account the *"coordination of working hours of the various visiting attractions, including tangible cultural heritage, according to the demand profile"* through establishment of a *"global program with appropriate scale which, under the leadership of the Alentejo Regional Tourism Entity, should involve municipalities, Museums, Church, Charity and other (...) asset managers"*. Another strategic priority is promoting the industrial tourism in the region by requalifying and creating tourism products through rehabilitation of industrial and mining sites for tourism.

In addition to the above mentioned strategic documents, the Alentejo region has also an Operational Plan for Supporting the Development and Promotion of the "Heritage in Alentejo" Product which combines action and strategy proposed by the Regional Entity of Tourism for 2014-2020 planning period. This plan advocates a strong emphasis on promoting tourism products around the existing classified World Heritage in the Alentejo region with the purpose to make tourism offer more inclusive, cohesive and attractive (POSDDP:3).

The patrimony assets of the Alentejo region inscribed presently in the UNESCO list as a World Heritage are the historic center of Évora city and the fortifications of Elvas city. In addition, the Alentejo's popular sing ("Cante Alentejano") and the art of making cowbells in Alcáçovas (village in the Central Alentejo region) are classified as intangible cultural heritage of humanity. Furthermore, processes to propose to UNESCO classification as cultural heritage of humanity for handmade carpets by people of the Arraiolos city (Central Alentejo) and popular parties of Campo Maior city (North Alentejo) are presently being developed.

## **6. METHODOLOGY**

This article presents some of the results obtained in research conducted in the sub-region of "Baixo Alentejo" with the purpose to understand tourism agents' perceptions on measures to be implemented in order to promote the development and competitiveness of tourism in

the region. The study has also looked at identifying the areas considered most relevant for cooperation among tourism agents taking a cross-sectoral perspective.

The empirical study was conducted with the use of a survey questionnaire applied to leaders of public organizations, associative sector and business managers working in the tourism sector in the “Baixo Alentejo” sub-region.

The information obtained was subject to a statistical analysis of essentially descriptive nature with the use of measures of central tendency and dispersion. In addition, the non-parametric Friedman test was used to identify the most relevant practices and strategies to promote cooperation among tourism stakeholders, activities with tourism potential and the most important attributes of the region for tourism activity. The Friedman test can be used to estimate significant ranking of a set of items submitted to evaluation by a panel of judges. Furthermore, the Kruskal-Wallis test was used to estimate differences among tourism agents’ perception concerning practices and strategies to promote cooperation among tourism stakeholders in function of the sector they belong (public, associative, business).

## **7. ANALYSIS AND DISCUSSION OF RESULTS**

According to all respondent leaders, competitiveness and the development of tourism in the “Baixo Alentejo” sub-region will be fundamentally improved, firstly, by increasing offer of tourist packages including circuits and organized visits, and then by increasing offer of attractions and thematic products and promoting tourism products and activities as well. The quality / price ratio and increased protection measures of (natural and cultural) tourism resources, while important, were considered relatively less relevant by all leaders for that purpose. This finding highlights the importance of the uniqueness of the destination’s resources, both natural and cultural that, if well promoted and energized, may constitute differentiating factors compared to other competing destinations.

This shows that the main concerns of the “Baixo Alentejo” tourism agents are confined to the development of the tourism product and attractions in themselves. In fact, the development of an identified and promoted area for visitors, i.e. a tourism destination, is only possible with the existence of a well identified tourism product, jointly coordinated and promoted by the various local bodies (Lazzeretti & Petrillo, 2006). Furthermore, the tourism product is a set of services that exist only because of a tourism attraction (Ignarra, 2003).

The need to increase the protection measures of natural and cultural resources emerges as one of the aspects least valued by the leaders of the public sector which seems to be related to the fact that tourism in the sub-region is still at a very early stage. For this reason, leaders consider that the exploitation of natural and cultural resources will be sufficiently safeguarded by the responsible entities given the low volume of tourists visiting the sub-region.

Concerning the domains in which tourism agents consider relevant to cooperate for promoting tourism development in the sub-region, results have indicated that the dimensions considered most important consist primarily in valuation of the local culture, followed by jointly developing resources and tourism products and organizing promotional activities as well. In turn, the less valued areas for cooperation were the development of the travel services industry and coordination of tourism management. The appreciation of the existing local culture and the development of resources and tourism products as priority areas for cooperation among tourism stakeholders is supported both by the agents of the public sector as the business sector. However, tourism agents differ relatively to the need for a joint organization of promotional activities. The agents of the public sector consider it important

for cooperation among all while the private sector agents attach greater importance to the jointly organization and promotion of the development of events and conventions industry. Tourism agents from the associative sector converge with the agents of the public sector with regard to the priority areas for cooperation above referred. However, they are also in accord with the agents from the business sector regarding the development of events and conventions as an important area for cooperation between them.

Both agents of the public sector as the business sector consider that the attributes most valued by visitors are related to food and the destination uniqueness in terms of natural conditions and of cultural identity. The same actors are also in agreement that the attributes less valued by visitors are the opportunities for shopping and for participating in religious events. The leaders of the associative sector consider that the most important attributes for visitors are in the first place, landscape and historical heritage, monuments and museums and, secondly, the tranquillity and the rhythm of life. In third place, the agents of the associative sector consider, in a balanced way, gastronomy, the uniqueness of the destiny and the availability and quality of tourist services. For those actors, the less relevant attributes for visitors is the opportunity for shopping and the availability and quality of local transport.

## 8. CONCLUSION

Tourism constitutes an activity with high potential for economic growth and regional development. For that reason, rural areas should adopt strategies based on a joint work prepared by multidisciplinary teams with the participation of all stakeholders who should be actively involved in defining and implementing these strategies in a long-term time horizon (Eusebius *et al.*, 2013).

The “Baixo Alentejo” is not yet consolidated as a tourism destination since it is an area with incipient tourism offer and demand. However, it has a high tourism potential resulting from the uniqueness of its natural and cultural resources. The development of this Alentejo sub-region should assume a set of strategies and policies involving all social actors at local, regional and national level and even at cross-border with Spanish sub-regions, in a frame of an integrated and interactive planning perspective.

The leaders of the public and of private business sectors agree on the need to cooperate with a commitment to promote local and regional cultural resources. This is important because the “Baixo Alentejo” sub-region has excellent cultural resources that, if well used, can constitute a great differentiating factor comparatively to other regions of the country. Those actors also value the need for entities to engage in joint efforts in order to build a set of stronger tourism products for the region, largely based on the tangible and intangible cultural resources. The tourism agents, especially those of the business sector, have indicated that the development of tourism events and conventions also constitutes a relevant sector for strategical investment. Events, such as medieval festivals, food fairs and wine, trade shows and conferences can constitute as a strategic investment for the development of tourism in the “Baixo Alentejo” sub-region in order to minimize the effects of typical seasonality of tourism. This strategy will contribute to a higher occupancy rate in hotels especially in low seasons and will maintain good profitability levels to certain destinations (Ansarah, 2000). The private sector leaders see this kind of tourism as tourism demand generator for the destination bringing more dynamics to the local territories and communities and as an incentive to investment returns if properly framed by cultural and business tourism offerings.

According to the perception of most tourism agents, the appreciation of gastronomy, the uniqueness of destinations in terms of natural and cultural resources and existing historical

and cultural heritage and even the availability and quality of tourism services are the core attributes for attracting visitors to the “Baixo Alentejo” sub-region. In fact, many of the tourists visiting the “Baixo Alentejo” sub-region are looking for the aspects more characteristic of the region such as is the case of the typical dishes, wine and architectural heritage. The challenge is to preserve and enhance the natural and cultural heritage, as an identity, social and developing resource, integrating production and natural processes, differentiating and adding value to products that contribute to the conservation of the ecosystems (PORA).

Despite all this awareness and importance given by the tourism actors to the need for valuing the existing culture in the sub-region and, in recent years, there has been an investment in the renovation and restoration of much of the cultural and religious heritage, many difficulties persist in the region because of the processes, although financed, are quite slow, largely due to the difficulty of coordination among the large number of entities involved. In this sense, it is important to streamline processes in order to focus on the renewal of the patrimony and, subsequently, making it more dynamic by including it in the tourism itineraries. In the “Baixo Alentejo” sub-region, some activities have already been planned in this way. For example, the “Fresco Itinerary” which constitutes a strong bet on Cultural Touring already includes some of the intangible heritage such as the “Cante Alentejano” and the art of making cowbells. Another example is the «Tile itinerary», which is a cultural and tourism dissemination project which aims to disseminate knowledge about the tile heritage of the region. Some municipalities have also a concern to articulate cultural activities of municipalities with local operators, by setting up organized programmes integrating a stay in a Rural Tourism accommodation, a historical itinerary, a wine tasting, a typical meal and a night with “Cante Alentejano”, articulating entities and different spaces (eg. Serpa municipality).

It is necessary that the actors gain consciousness that networking, enhancing the potential of each municipality and adding all this potential to the neighboring municipalities, the tourism activity will gain scale for capturing, not just visitors, but above all more investment in the sector. The cooperation networks in the tourism activity in the rural spaces may be cross-border (as is the case of village networks), aggregating the resources of several territories (regional, national and transnational). Those networks can also bet on the recovery of some localities (towns and villages) of the sub-region, constituting them as a great tourist attraction. There are already some examples of revitalization programs for towns and villages (eg. Recovery Program of Historic Villages) which are coordinated by the Regional Development Entity and have the ambition to revitalize and energize the rich spaces in heritage, culture and tradition. This is important because those revitalization programmes has a relevant impact on the slow the aging population trends and on the depopulation of the local territories (Nascimento, Nogueiro, Paul & Bastos, 2008:2072), responding to some of the existing problems in rural interior territories of the country. Moreover, these programs have in essence a practice of intersectoral cooperation, gathering dimensions such as socio-economic animation, involving local actors through, for example, existing local development associations, and tourism promotion in the domestic and international market.

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# MODELLING TOURISM DEMAND IN MADEIRA SINCE 1946: AND HISTORICAL OVERVIEW BASED ON A TIME SERIES APPROACH

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## ABSTRACT

Tourism is the leading economic sector in most islands and for that reason market trends are closely monitored due to the huge impacts of relatively minor changes in the demand patterns. An interesting line of research regarding the analysis of market trends concerns the examination of time series to get an historical overview of the data patterns. The modelling of demand patterns is obviously dependent on data availability, and the measurement of changes in demand patterns is quite often focused on a few decades. In this paper, we use long-term time-series data to analyse the evolution of the main markets in Madeira, by country of origin, in order to re-examine the Butler life cycle model, based on data available from 1946 onwards. This study is an opportunity to document the historical development of the industry in Madeira and to introduce the discussion about the rejuvenation of a mature destination. Tourism development in Madeira has experienced rapid growth until the late 90s, as one of the leading destinations in the European context. However, annual growth rates are not within acceptable ranges, which lead policy-makers and experts to recommend a thoughtfully assessment of the industry prospects.

Keywords: Madeira Island Inbound Tourism, Butler' Life Cycle Model, Time Series Modeling.

JEL Classification: L83

## 1. INTRODUCTION

According to Garay and Cánoves (2011) studies focused on the history of tourism are relatively recent, although there is growing recognition of the key importance of such analysis (Walton, 2005). However, the standard analysis is too often centred on the “cultural foundation of the historical evolution of tourism” or on the relationship between tourism development and the adoption of new ICT related technologies or modern habits of consumption and societal changes. (Inglis, 2000; Smith, 2001). Another criticism relates to the reduced number of long-term approaches, from a regional historical perspective, concerned with the tourism experience outside the Mediterranean area.

In these circumstances, the overall objective of this paper is to “carry-out” a detailed analysis of tourism development in Madeira based on Butler Tourism Area Life Cycle, one of the most applied model to think strategically about tourism development (Butler, 1980; Douglas, 1997; Bardolet & Sheldon, 2008; Garay & Cánoves, 2011). Because of the availability of an exceptionally long time series, this paper offers the opportunity to detect secular trends and specific features in tourism industry in a peripheral area not impacted by the mass tourism phenomena and therefore less interpretable within the

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standard theoretical and methodological apparatus (Tooman, 1997; Douglas, 1997; Karplus & Karkover, 2005). The current literature on the subject revealed a dearth of timely and exhaustive analysis of consolidated/mature destinations outside the “mass/coastal tourism” hotspots, despite their past glories in the field of tourism. For example, the development process of tourism development in Madeira, “one of the oldest tourists’ destination in the world with a centenary tradition”, has “scarcely been studied” (Ismeri Europa, 2011:135). Therefore, in this study we analyse the different phases of tourism development in Madeira, and related them to global and local processes, such as issues of accessibility, that affect tourism development and the current attempts to rejuvenate the destination. The analysis of mature destinations is of interest for policy makers and operators, because lessons learnt from mature destinations succeeding in apply consistent policies to promote renovation are specially welcomed by policy-makers eager to succeed in revitalizing the destinations under their jurisdiction.

Although, the prevailing theories about the maturity decline phase predicted an inevitable phase of decline, the empirical evidence doesn’t support such allegations, which is confirmed in this study (Pulina *et al.*, 2008; Garay & Cánoves, 2011). Tourism development must be interpreted as a process guided by governmental interventions, fostered or constrained by political and social factors and by past decisions on tourism planning, urban development and other key economic variables. Since this study operates at a relatively large scale, from a temporal point of view, we only consider the macro-issues in trying to explain tourism development in this case study.

This paper is organized as follows. Section 2 describes the key pressing economic issues affecting the region under analysis and an overview of tourism sector is presented. Section 3 introduces a brief analysis of the theoretical background retained for this study. Section 4 describes the tourism development path of Madeira since the end of the Second World War. Finally, section 5 concludes by contending that the overall conclusion to be drawn is time dependent.

## **2. CONTEXTUAL SETTING**

The archipelago of Madeira which comprises two inhabited islands, Madeira and Porto Santo occupies an area of 801 Km<sup>2</sup>. With a population of 258686 (as of 2014) and a density of 326,2 per Km<sup>2</sup>, the archipelago lies in the Atlantic North, 1000 km from Lisbon and 400 km from the Canary Islands (Tenerife). Madeira is affiliated to Portugal and constitutes one of the Outermost Regions (ORs) according to the EU legislation.

Tourism has been the dominant sector of the economy and enjoys a centenary tradition as Madeira is one of the oldest touristic destinations in the world. According to the most recent data, by taking into account direct and indirect effects of tourism, the sector account for 21% of the GDP and 15% of the employment (Ismeri Europa, 2011:136). Owing to the island’s natural beauty and aesthetical landscapes, plus a mosaic of rich biodiversity, picturesque villages and an overall ambience of security and calmness, the region has been hailed as amongst the best in the World.

Over time Madeira has been able to avoid to be confronted with major issues in terms of severe environmental damage and natural resources degradation as a result an unmanageable number of visitors. Only minor issues of uncontrolled building construction and problems of waste and garbage management were detected. As of 2015, the number of tourist per km, in the EU island’s context is quite low. The overall quality of the destinations remains pretty stable and most visitors report high levels of satisfaction when asked their opinion (Synovate, 2004; ECAM, 2010).

As a direct result of its membership to the Union, Madeira benefited since 1986 from an impressive growth record and low employment rates, as a result of a positive economic dynamics fuelled by EU grants. As with other ORs, “the past heritage of colonial structures” and marginalization lead naturally to the adoption of welfare focused policies (Ismeri Europa, 2011:138). Therefore, a “generous welfare system” and the attempts to implement “social equalization” policies aiming at recovering from the islands late arrival to the neo-Keynesian are a key feature of the political economy approach pursued by the local government (Ismeri Europa, 2011). While the tourism sector along with the construction and public administration sectors still predominate in terms of GVA and employment shares, it must be acknowledged that the tourism sector was less heavily handed by the local government. As previously mentioned, Madeira, experienced a positive growth dynamic for the last 25 years. The GDP at constant prices increased constantly and at a higher rate compared to the Mainland, which prompted the region to become the second-richest in Portugal. Figure 1, based on data supplied by the Local Statistical Office, compares the growth trends for Portugal, Madeira and Azores for the period 1995-2012, when the region grew at 5,8% per year, well above the Portuguese average (3,8%). However, the region experienced a slowdown in its catching up process since 2008 and the growth momentum experienced in the 80s and 90s was not maintained in spite of the on-going access to financial transfers. In fact, the local economy experienced a sharp fall in GDP levels (-2,8% for the 2008-2012 period), which prompted relevant actors to develop increasing levels of awareness and understanding of the seriousness of the current economic situation.

According to the Ismeri Europa Report (2011), Madeira emerged in the 90s and first half of the first decade of the XXI century as an example of success in developing the tourism sector, within the EU context. The islands receive around 1.000.000 tourism per year. “This success” is thought to be closely linked to abundance of tourism raw materials, namely nature, mild climate and an excellent and well-deserved reputation for the warm welcome offered to visitors. Similarly, the geographical location, sufficiently close to the European Mainland to allow a 3-4 hours’ flights from North Europe and close enough to Africa to offer an exotic flair and aesthetical pleasant landscapes should be fully considered as comparative advantages. As mentioned above, the tourism industry contributes with 21% to the GDP, and the tourism receipts for 2014 have been estimated at 300 million euros (for hotels establishments alone), according to the statistical office. Still according to the statistical office, around 157 hotels are in operation, as of September of 2015, serving 6267443 bed-nights. However, by taking into account the rural tourism sector along with Local Housing we get an overall figure of 32150 beds in terms of accommodation capacity. According to the Statistics Department, the tourism and travel related sectors employs around 15% of the active population.

The typical tourist can travel around the island, or enjoy the rural hinterland by walking along one of the levadas. As Madeira is an island of contrasts, and a convenient way to check the islands may attractions is to rent a car. Owing to the rugged mountain outcrops and picturesque villages along the coast, a long range of activities, from diving to mountain sports are available. Several museums and places of historical significance can be assessed to get in touch with the history and current life styles of the population. In 2014 the statistical office reported 1140250 tourist visits, of which 19% are of Portuguese nationality and the rest incoming tourists from Germany, Britain, France and Others. The local airport offers more than 50 direct flights per week to several European cities. The Madeira international airport was expanded in 2000 and is now served by 30 airlines.

### **3. A FEW NOTES ON THE BUTLER LIFE CYCLE MODEL**

The Butler' life cycle model offers a starting point/theoretical framework to engage in historical approaches in the field of tourism, if mixed with other theoretical frameworks. A key reason for an eclectic approach lies in the difficulties reported by scholars attempting to offer theoretical insights to explain and describe the last stage. Garay & Cánoves (2011) maintain that the decline and re-orientation phase as depicted in the TALC model is "too simplistic and restrictive" and similar comments were also made by Agarwal (2002). The evidence available suggest that, from a long-term perspective, to consider just one large life cycle is insufficient because consecutive life cycles may occur, either as a result of stages of development induced by the "major paradigms of capitalism development" or as a result of internal factors. It is worth to mention that in the stagnation phase/rejuvenation phase, almost all destinations attempt to up-grade and re-invent the image of the destination based on new market niches. In fact, in the absence of a re-orientation ("re-invention") phase, the destination may experience a phase of irreversible decline. This last stand is characterized by increased levels of uncompetitive behaviour, fewer and fewer number of arrivals of international travellers and spatial "recession" linked to the abandonment of resorts in peripheral areas. It is not surprising then, to notice a plethora of government sponsored programs to redefine the destination, as soon as the first signs of stagnation appear. In this study, we assume that several life cycles may occur simultaneously, as during the transition to a new phase, reinvention coexist with elements of the previous phase. As asserted by Garay & Cánoves (2011) *"many, if not most, destinations do not involve one single cycle but a series of cycles at different stages of development"*, while on the post-fordist stage. Quite typically, the local DMO and operators are in a permanent state of re-invention and modernization (which points to the rejuvenation phase), while trying to apply the best practices tested in the field without losing sight of the traditional and consolidated practices (from the previous stages).

Inputs borrowed from the economic history have been extraordinary important to discern the major phases of tourism development at regional and national level. In an attempt to examine the major cycles of tourism development in Catalonia, Garay & Cánoves (2011) identified 4 major stages of development in the case of Catalonia: "proto-tourism, pre-fordism, fordism and post-fordism". Garcia (2014) and Fayos-Solá (1996) apply a similar approach to analyse tourism development in Spain and Portugal. Such stages are related both to the different accumulation regimes ("production and consumption of tourism activities") experienced by the economy as a whole and to specific "tourism models of regulation (political, institutional and competence forms related to tourism)", which, in turn, are influenced and impacted by a wide range of "cultural, social, economic and technological" features at work. As reported by Garay & Cánoves (2011) *"the destination's historical, geographical and political distinctiveness compounded by the interaction between the key players (governments, hoteliers and foreign firms) are utterly decisive in defining the keystones of the sector's development path"*.

### **4. AN OVERVIEW OF THE HISTORY OF TOURISM IN MADEIRA**

The background of Madeira' tourism starts officially in 1812 with the first opening of a hotel in Funchal. However, tourism has existed for many centuries. The City council website defines two major periods of tourism development in Madeira: the colonial period running from the 15<sup>th</sup> to the 18th centuries, and therapeutic period comprising the 19th century and the first half of the 20th century. Tourism in each period behaves differently according to the main motives to visit the island. However, both share similarities, notably the overall

dependence on the “paradisiacal beauty” and “the kindness of its climate”, as well as on the umbilical link to the transatlantic voyages.

The key event in the first half of the XX century is rather organizational and institutional, because of the key changes in terms of promoting the sector abroad. The following description and references to historical events is based on the information supplied by the Camara Municipal do Funchal website. In the 30s, the newly established Tourism Commission came into existence, with the ultimate goal of planning the implementation of measures to advertise the region abroad. The Tourism commission attended the Leipzig Fair in 1931, which resulted in visits from journalists, and subsequent drafting and editing of texts celebrating the island beauty in several newspapers and magazines: “Tatler” (1931); o “Time” (1933); o “Daily Mail” (1933); o “Daily Telegraph” (1939) e o “The National Geographic Magazine” (1939). It is worth to mention that during the 20s and 30s, a large number of tourists were *“aristocrats, finance businessmen and famous public figures, such as the Prince of Wales and Churchill, as well as some still searching the therapeutic qualities”*. According to the Funchal city county website, as a result of the Nazi social politics, the organization “Kraft Durch Freude” - Power by Joy, affiliated in the national-socialist party, offered (in the 30s) to its members the opportunity to practice cultural and sports activities, by organizing trips that used Funchal as a port of call. To a certain extent, the first half of the XX century is still heavily influenced by the trends laid down in the last decades of the XIX century.

Tourism before and during the second World War declined significantly. As a consequence, a large number of hotels closed. During the turmoil of the Second World War, the islands hosted mainly wealthy English and Germans, arriving on transatlantic ships and eager to escape violence. Modern tourism, as the term is commonly understood, started “officially” (at least in the official records) at the end of the Second World War, period in which the number of tourists recorded by the Statistical Office was less than a thousand a year. Data recorded for 1946 indicates just 936 guests, which points to a fresh start in this sector. In fact, and immediately after the world war, Funchal was excluded from the transatlantic exchanges, because the “big” transatlantic ships, “that used to stop regularly in the port of Funchal”, were diverted to other “better equipped” and better located ports of call, such as Las Palmas and Tenerife. Therefore, the upmarket aristocrat segment ceased to exist based on the aforementioned travelling mode.

In the early 50s, the region boasted 453 rooms for 9131 tourists. The high season was largely dependent on the Winter period, centred around November to March and an average of 142135 visitors come ashore, from the transatlantic ships. Owing to the opening of direct flights (international flights and charters) with Lisbon and the Uk, first in 1949, then in 1960 and finally in 1964 (when the new airport was officially opened for traffic), a new period of discovery started, and the number of tourists increased steadily. By then, tourism was already perceived as an important and strategic pole of development. The previous 17 years were characterised by rather modest increases, owing to the low levels of accessibility, but the sector expanded strongly after 1964. In the second half of the sixties and in the first years of the 70s, the island witnessed the arrival of a flux of a different type of tourists, comparatively to the first years of the post-war period when most visitors travelled by hydroplane. As a direct result of the opening of new routes and arrivals of middle-classes visitors, tourism enters the development phase, and the number of hotel facilities increases. By 1967, 2295 rooms were available, and 3832 as of 1971. New establishments, such as the Madeira Palacio (1969), Apartamentos Lido-Sol (1970) Madeira Sheraton (1972), Holiday Inn e Matur (1972), D. Pedro-Machico (1972), opened in the early 70s. By 1973, the hotel industry operated 8248 beds. Another key post-war development lies in the growing Portuguese middle class, as a result of the economic development recorded in the 60s and 70s, eager to travel both at home and abroad. Meanwhile, Madeira emerged since the 50s as one of the target areas at

national level, but contrary to the Spanish case the Portuguese government never allowed a laissez-faire model of regulation. In Spain, the government “gave free reign to the market’s actions and, more specifically, to speculative investment, which triggered not only tourism but also the residential model implemented throughout the majority of the Spanish Mediterranean coast” (Garay & Cánoves, 2011). Similarly, to the Spanish case, the Ministry of Tourism in Portugal was rather interested in promoting a “positive image of the country abroad” at expenses of more mundane affairs such as “issues of regulation and intervention”. With regards to Madeira, given the relatively low volume of arrivals, the tourism sector was never able to perform in the 50s and 60s as a decisive factor leading to levels of “economic growth” compatible with high levels of human development.

Since 1976, Madeira enjoys an autonomous status within the Portuguese Republic, with broad executive and legislative powers. The region was granted to be ruled by its own government bodies, such the Regional Government and the Local Parliament. The government structure includes a Regional Departments, regarded as Ministries. Overall, this period is characterised by impressive economic growth, particularly after 1986. In the first years of autonomy, the local government focused on the urgent need to close the gap in terms of key infrastructure projects and social indicators. As a result of the ascension to the EU, a remarkable number of new infrastructures (roads, bridges, civic centres, schools and hospitals) come into view, and the region experienced a cycle of political stability and high levels of employment.

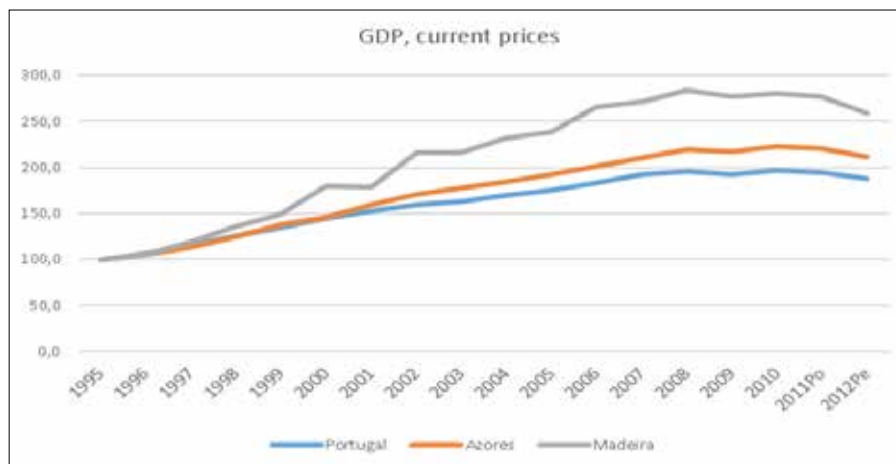
Thanks to the autonomy granted in 1976, a key structural institutional breakthrough took place in 1978, with the establishment of the local “Regional Department (Ministry) of tourism”. From 1936 through 1978, tourism was run basically by the authorities at Lisbon. As mentioned above, another major structural change that occurred in the 80s relates to another upsurge in the number of Portuguese national arriving at Funchal, in their search for mild climate temperatures at the height of the Summer.

Arrivals and overnights registered a remarkable growth rate in the 1964-1977 period, followed by a sharp decrease concentrated in 1978. The first oil-shock struck the European economy and the sector was impacted both by the negative international context and by the political and social instability associated to the first IMF intervention in Portugal. The Portuguese market predominated from 1971 through 1976 (around 23% of the overall demand). The accommodation sector adapted by increasing “moderately” in numbers, but remained solidly concentrated at Funchal, the main city. The period from 1986 onwards was characterised by a spectacular development phase, owing to the convergence of a series of positive factors. The increasing affluence of the Portuguese middle class lead increasing numbers of Portuguese nationals travelling to Madeira. Moreover, the access to substantial amounts of financials transfers allowed the local economy to take off and an extensive network of modern roads linking Funchal to the hinterland was built. The rural hinterland was now open to be discovered. Not surprisingly, impressive growth was recorded once more in the 1980-1999 period fuelled by sustained increases in the German and British markets. This demand effect was transmitted to the accommodation sector that experienced an impressive growth of 7% per year in the 1990-2010 decade. Then as now, the key reasons to travel to the island remain pretty stable, owing to the overwhelming focus on nature, mild climate, relaxation and rest.

The Portuguese market offered in the 80s a sizeable guarantee of secure supplies of new arrivals. Through the 80s and the 90s the Winter period loses gradually its importance and in the 80s, the local Ministry of Tourism starts to promote a wide range of sports, cultural activities, events and festivals in order to reduce the levels and image of seasonality. Tourism reinforces its role as a key engine of growth in the 80s, despite the overall reliance on government grants channelled for the deployment of basic infrastructure, which resulted in

an oversized public sector. The growth record of the 90s was driven mainly by the Portuguese, British and German markets. Figure 1 shows that the number of arrivals increased from 520515 in 1990 to 880228 in 2000. During the 80s, the number of visitors stayed in the level of one third of million, but a period of rapid growth followed and the number of 1000000 was reached in 2005. Although the expectations ran high in 2000, as a result of enlargement of the airport run-away, the statistics available suggests an increasing volatile demand, and a number of negative events, namely the 2010 disaster. The growth rate recorded in the late 90s was never registered again. The growth rate in 2010 run at -7,8%, but it recovered the following year at 6,2%. Since 2012, the average number of arrivals/guests stayed at the level of 1070000.

Figure 1: GDP, growth Dynamics 1995-2012 in Portugal, Azores and Madeira: 1995=100



Source: own calculation based on data supplied by the Madeira Statistical Office

The first signs of stagnation and declining numbers of Portuguese nationals were first felt in 2000. In all, slightly more than one third of the number of years that present negative growth took place during the first 10 years of the new century. From this point onwards, we may assume that two different Life Cycles remain in operation, namely the classic product strongly anchored on top accommodation based at Funchal, in the maturity phase, and an emergent one, based on the exploration of the hinterland. The share of the main city Funchal, declined, in terms of arrivals and overnights, at expenses of counties located elsewhere. The priorities for the economy as a whole for 2014-2020 period, as defined in the Economic and Social Development Plan implicitly acknowledged that a few sectors have reached saturation. The plan aims at the following areas, Innovation, RTD and Energy, Human Capital Development, Competitiveness and Internationalization, Environmental sustainability and Territorial Cohesion and Social Cohesion. While such measures do not directly cover the specific needs of the tourism sector, a stringent implementation of the wide range of instruments relating to the measures listed above will have far reaching consequences in terms of the development of the tourism sector in brand new niches. Quite recently, the local government in close association with the Chamber of Commerce and Industry develop from scratch a specific strategic document aiming at the tourism sector for the next decade (ACIE, 2015). Several market niches and nationalities emerged as strategic, notably the nautical sector and the Easter Europe.

Table 1 offers an overview of the most recent data, namely in terms of accommodation availability and average length of stay. As of November of 2015, the region operates around 13687 rooms. In 2014, the region received about 1 million visitors. The length of stay, in the range of 7 days until 1976, went down to 5,5 days in 2014. As of September of 2015,

more than 61% of hotel rooms were located at Funchal, but the share of the main city decreased from 69% in 2002 to 66% in 2014. The Western counties' share of international arrivals increased by 24%, but since 2010 we witness the virtual stabilisation of the market shares in terms of guests and overnights by county. The number of overnights dropped after the 2010 natural disaster, the effect of which as compounded by the decreasing number of Portuguese nationals travelling to Madeira as a results of the 2011 IMF intervention. The German and British markets still predominate. From a "regional origin" point of view, the European market predominates, with 97,7% of the market as of 2014. Visitors from France and Eastern Europe have been growing, and the share of Portuguese nationals decreased sharply after 2008 (Costa & Almeida, 2015; Ramos-Pérez & Izquierda-Misiego, 2015).

**Table 1: Madeira' Tourism: Basic indicators**

Establishments	152	nov-15
Rooms	13 192	nov-15
Accommodation capacity	27 140	nov-15
Personel employed	5 910	nov-15
Length of Stay	5, 6 days	nov-15
Share of Funchal (guests)	64,50%	nov-15
Number of overnights	6629000	2015
Number of Guests	11211800	2015

Source: based on data supplied by the Madeira' Statistical Office

Table 2 depicts the distribution of respondents by nationality and their annual growth rate for the 1976-2014 period. Annual growth rate for the top 12 European countries varies from -0,7% to 6,9%. A study commissioned by the local Tourism Department suggests that most visitors are travelling to the island to enjoy mainly nature and landscapes. The study can be summarised as follows: nature and mild climate are the key attractions of the region; however, an increasing number of visitors value the local gastronomy, traditions and heritage; about 45% of the respondents declared to be repeat visitors with 55% being first visitors; visitors visiting for the third and fourth time correspond to 11%.

**Table 2: Main markets of origin**

Countries	Guests	Market Share (2014)	CAGR 1976-2014
Total	1 140 250	100,0%	3,9%
Portugal	217 665	19,1%	2,6%
Foreign Countries	922 585	80,9%	4,4%
Germany	219 591	19,3%	4,7%
Austria	17 076	1,5%	6,7%
Belgium	23 451	2,1%	1,5%
Denmark	23 778	2,1%	0,9%
Spain	38 620	3,4%	7,6%
Finland	24 225	2,1%	5,5%
France	134 834	11,8%	6,9%
Italy	13 389	1,2%	6,9%
Norway	17 537	1,5%	4,8%
Nederlands	37 722	3,3%	4,3%
United Kingdom	222 221	19,5%	5,0%
Sweden	26 523	2,3%	-0,7%
Other Coutries	123 618	10,8%	5,7%

Source: own calculation, own calculation based on data supplied by the Madeira' Statistical Office

At this point, we will comment briefly on some of the question raised in the introduction. From 2005 onwards, the tourism sector is experiencing a transition phase, characterised by the stagnation of the classic product and by attempts to develop alternative sectors to circumvent the main weakness of the mainstay product. The growth record is no longer uniform, being not unreasonable to admit at the time (in 2005), on the basis of the available data, that the region had just reached the Butler's last stage. However, signs of recovery can be identified from 2012 onwards, which makes it possible to suggest that conditions have been met to begin a new cycle of growth. The reversal in the declining trend alert us against drawing hasty conclusions, by declaring the region to be officially in the declining phase. After 2012, the tourism sector appears to have found a new balance, and entered a new growth phase, which can be explained in several ways. The natural landscapes and mild climate all year round enabled the local authority to promote and convey abroad, over the past decades, a simple and concise information. Moreover, the cycles of political violence in the Middle East appeared to have been beneficial to tourism in Madeira, because the number of arrivals increases above the trend in periods of turmoil. However, to consider that the current trend equates to a new Life Cycle for the destination as a whole may be excessive, because the key elements of the previous phase remain in full force. Moreover, from a long term perspective, the progressive decline of the annual growth rate is quite evident and the overall dependence on the main markets (Britain, Germany, Portugal, France and the Netherlands) (See Figure 1). Since 1976, for each year the market share of those markets increased by 0,36%.

According to a recent report commissioned by EU the main weakness of the local industry lies in the excess of accommodation supply and in the progressive and generalised loss of competitiveness, compared to more exotic destinations. Despite having registered very slow growth in the last 10 years, the local tourism experience nonetheless still offers high levels of customer satisfaction. The same report urged the region to upgrade the existing product under the cultural/heritage banner. Added value to the customer can be easily produced by betting on the local identity and agricultural traditions, culture and heritage, nautical sports and nature. The region still has to offer an exotic flair and visitors can combine the green experience with urban leisure. In this regard it is recommended, among other things, to increase the complexity, from a motivational point of view, of the current mainstay. Top quality accommodation alone cannot counteract the main moves of the regions' competitors and the new life cycle will not be consolidated unless the region provides value added/unique experience. As admitted by the local operators the sector faces serious challenges from increasing competition from other destinations, as well as, from the economic downturn felt in most European countries, which are relevant in terms of market of origin.

Off course, the sector must adapt to the low cost phenomena and to the changing behaviour patterns. A cluster based approach to the tourism sector is recommended as well as benchmarking studies to identify best cases and "support the diversification process". The integration of sustainability principles is deemed to be a priority because the sector is highly dependent on nature and landscape and prone to disasters. In all, a more intelligent approach to develop tourism is recommended and a larger transformation in the economy as a whole is required. When considering further recommendation, it should be kept in mind that the over-dependence on tourism exposes the region to external risks. The high dependence "upon" tourism means, a high degree of exposure, and vulnerability, to the *"erratic and uncertain movements of international tourism"*. While natural disasters, such as the 20<sup>th</sup> of February impacted negatively the region, security issues in the Middle East are likely to impact positively the region, so the two effects are likely to cancel each other out.

In conclusion, Madeira didn't follow the typical trend characterising other destinations lying in a similar parallel in the Mediterranean area, with rapid growth in the 60's and 70's and then a slowdown or even collapse in the number of arrivals in the 80s followed by a



recover in the 90s'. Because not dependent on the 3-s product tailored to the mass market, the region didn't suffer from environmental degradation and chaotic urban development, and ultimately decline apparently beyond recovery and loss of competitiveness. On the contrary, the sector showed strong and continuous growth until the 2003. While tourism development was characterised by the development of mass tourism elsewhere in Europe, a process known as the Fordist phase, as a result of the consolidation and further expansion of the Welfare State in Europe, tourism numbers never exceed the local carrying capacity. Owing to the distances to the European Mainland along and access exclusively by air, tourism in Madeira was restricted to the middle and upper middle classes. Madeira attracted mainly, until the 80s, the kind of "bourgeois" tourist that characterised the "pre-fordist" phase in other destinations, because no access by car was available to the low-middle class attracted by low prices and short one-day or extended holidays. Issues of accessibility and geographical proximity are therefore keen to understand the path of tourism development in the 60s and 70s.

The data suggests that the TALC may not apply in a deterministic and perfect manner to the evolution of tourism in Madeira. Madeira is a typical example of an Atlantic destination that operated in this sector for centuries, firstly as a "welcoming society" and then, since the 60s, as a modern operator. The region never catered for large numbers of tourists or for a large audience, owing to clear limitations in terms of access, which prevent growth to become exhaustion through over-exploitation and environmental degradation. The relative smallness of the potential market and being ahead of their time in terms of focus in nature, have also contributed to slow down growth. The key question that remains to be answered. As mentioned above, the unique pattern "urban development" and orography of the island is critical to understand the past and current development of tourism. Madeira is mountainous, and only 16% of the island has a gradient of less than 30°, flat terrain and sandy beaches are almost inexistent. It is similarly clear that Tourism in Madeira results from historical processes and policy initiatives. Until the 90s, tourism remain largely unplanned, owing to the lower inflationary pressure over the natural resources and lack of episodes of stagnation and/or dramatic/substantial decline in the key variables. Only after 2000, could be traced the first attempts to regulate tourism development, by defining land zoning and building features as well as the carrying capacity limits by county. An attempt was made to keep Madeira's distinctive image of a green island and eco-tourism paradise and the most recent strategic thinking about tourism development in the region

## 5. CONCLUSIONS

As stated in the Ismeri Europa report (2011:135), tourism in Madeira benefits from a "centenary tradition" (Madeira is one of the oldest touristic destinations in the world)". By taking into account "*all direct and indirect effects of tourism*", *the data available clearly indicates that tourism has been a major influence on economic growth, with the empirical estimates suggesting that it may account for as much as 21% for GDP and 14% for employment*". The tourism, in terms of development differs both from "the mass offer" provided by the Canary Islands and from "the scarce hotel capacities" currently available in the Azores. Therefore, tourism in Madeira is neither based on the mass approach still striving in the southern neighbour nor in the market niche model currently in the phase of consolidation in the Azores. While signs of stagnation felt since 2000 along with the sudden impact of the 2010 natural disaster forced the local experts to reconsider the strategy in place at the time, the records available since then point in the opposite direction. In spite of several bouts of global economic instability and major natural disasters, the sector has shown remarkable resilience, with growth rates

within acceptable limits. The sector has bypassed many environmental and image problems experienced by other players and the key advantages attracting visitors to the region still appear to be significantly valued by western visitors. Off course, the region must compete with other well prepared competitors.

To study the visitors profile is a matter of survival, as well as, to communicate in new ways. New market research methods are definitively required, and the public administration needs to understand the ongoing socio-cultural changes, namely in terms of the ecological stance. Nevertheless, the prospects for the industry are positive because the region has to offer world-class natural resources and an interesting historical background. New developments in promising markets such as nautical sports and gastronomy are schedule to start operations in the next few years. Moreover, the economic recovery in Europe is compatible with a sustained number of arrivals from Western European countries. The high level of real and perceived security, and the highest standards in terms of quality, reliability and service, offer another advantage, as the Middle East crisis clearly illustrates. The sector should explore the agricultural past of the island, due to its links to the “culture of the people, in the landscape and environment”. In the same vein, the “vineyards and the wine industry” could explore the Madeira Wine effect. Similarly, the banana cultivation offers an entry point to explore the island culture and history. Although agriculture is in percentage terms marginal with a very limited impact in terms of direct contribution to the GDP, it’s impact in the social fabric of the island life is enormous. The agricultural work supports the environment and landscape, and adds an essential element to “the identity and authenticity of the region” promoted abroad. The factors “environment, landscape, identity and authenticity” are currently understood as crucial elements to attract tourists and to convey an up-graded and redefined image of the region abroad. A number of agricultural products and practices offer a sub-tropical flair. Moreover, the few “manufacturing industries”, mainly centred in the production of “traditional” products, such as embroidery and wicker products as well as the wine production offers interesting grounds to explore the cultural segment. In the end, as “all the economy in Madeira is transversally affected by tourism”, it is not too complicated to identify a wide range of viable forward and backward linkages that may be used by entrepreneurs eager to innovate and gain market shares.

Whilst being acutely aware of the need to preserve the environmental *status quo* and avoid signs of decline.

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# THE UNDERSTANDING OF THE TOURISTIC VALUE OF PORTUGUESE OVERSEAS MONUMENTS: THE CASE OF ANGOLA (1959-1974)

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## ABSTRACT

The present study aimed to evaluate the understanding of the touristic value of Portuguese overseas monuments during Estado Novo, having as case-study the then colony of Angola between 1959 and 1974, years marked by the creation of the Information and Tourism Centre and the fall of the regime. Thus, considering the reality of the metropolis, we aimed to identify and analyse the evolution of tourism in this territory, as well the understanding and use of historic monuments by a nationalist regime as points of touristic interest and legitimisers of the national colonialism. We argue that during two different but totally complementary moments devoted to the relation between tourism and historic monuments of Angola, there was a real understanding of their touristic value. Besides that we claim that the believers of the touristic value of those monuments were very often advocates of the preservation or restoration of their pristine characteristics, an idea that we can affiliate to the thought of António Ferro to whom the success of tourism was extremely dependent on preserving and emphasizing the picturesque and idiosyncratic characteristics of those tourist destinations. To achieve our goals we have identified and analysed some tourism-related periodicals, thematic studies and legislation.

Keywords: Angola, Historic Monuments, Tourism, Fernando Batalha.

JEL Classification: L83

## 1. INTRODUCTION

Since the 1940's or from the time when tourism came under the aegis of the Secretariat of National Propaganda, it became more common to use this activity as an instrument of propaganda especially by demonstrating the unique aspects of what Portugal had to offer to visitors and tourists. The "regional pousadas", some of them installed in historic monuments, were an important part of this differentiation strategy.

Around the same time tourism also started to grow in the Portuguese overseas colonies, mainly in Angola, Mozambique or Portuguese India, with the creation of the Information and Tourism Centres in 1959, a consequence of the gradual growth encouraged since mid-1930's and truly consolidated from the 1940's. In this context some public bodies or individuals, such as the Information and Tourism Centre of Angola or the architect Fernando Batalha, understood and promoted the touristic value of the historic monuments of this territory that, at the time, was a part of the Portuguese overseas universe. This understanding of the ancient churches and fortresses as tourist attractions along with landscapes, beaches or game reserves, is evident when we go through the pages of travel or tourism publications.

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Thus, in this paper we aim to evaluate the development and consequences of the understanding of the touristic value of the Portuguese overseas monuments, especially the ones from Angola, from 1959 to 1974, without forgetting the reality of the metropolis [i.e. mainland Portugal], where tourism and the national architectural heritage were clearly understood as instruments of a propaganda strategy that valued historic and idiosyncratic aspects. Regarding methodology we will give preference to the analyses of tourism publications.

## **2. TOURISM AND HISTORIC MONUMENTS IN THE PORTUGUESE OVERSEAS COLONIES**

Over the last few years we have studied the evolution of the safeguarding of the Portuguese overseas architectural heritage between 1930 and 1974<sup>2</sup>, a period marked by the *Estado Novo*'s strong colonial component, by the full understanding of historic monuments as testimonies of the Nation's greatness and by their use as instruments of propaganda and legitimisers of an alleged right to discover, conquer, occupy and colonize. Within our research we understood that tourism was considerably connected to the materialization of several restoration works mainly from the 1940's, when this activity, understood as a "*source of richness and poetry*" (Ferro, 1949) came under the aegis of the Secretariat of National Propaganda<sup>3</sup>. However at this moment we are especially interested in the fact that during this phase marked by the understanding and utilization of tourism as an instrument of propaganda through the promotion of differentiation as a key to the development of tourism in Portugal, several "regional pousadas", small hotel units, were opened, precisely, in historic monuments restored and adapted for this purpose. This happened mostly from the 1950's in abandoned, ruined and disabled former conventual buildings or fortifications such as Óbidos castle (1950), the fort of Saint John the Baptist of Berlenga (1953), the Lóios convent (1965), the fort of Saint Philip of Setúbal (1965) or Estremoz castle (1970).

Meanwhile tourism started to grow also in the Portuguese overseas colonies. In 1934 there appeared the first action towards the strengthening of commercial relations between the metropolis [i.e. mainland Portugal], Angola and Mozambique and the promotion of products, a situation that indirectly promoted the activity/industry under study. We are now referring to the "Casas da Metrópole" organised in Luanda and Lourenço Marques and to the "Casas do Ultramar" installed in Lisbon and Oporto after the publication of the Decree-Law nº23:445 (1934). In 1959 these "Casas da Metrópole" were replaced by the Information and Tourism Centres created in Angola, Mozambique and Portuguese India, public bodies that were dependent on the overseas provincial governments even though they were guided by the General Agency of Overseas (Decreto-lei nº42 194, 1959). However it is important to underline that despite the exponential increase witnessed from 1959, tourism in the Portuguese colonies was far from being inexistent until then. Thus, we believe that the creation of these Information and Tourism Centres was merely a consequence of the gradual growth promoted by the strategy initiated in 1934 and truly consolidated from the 1940's, as referred before. After all, in 1947 the city hall of São Tomé created a tourism service (*Boletim Geral das Colónias*, 1950, XXVI, nº301); dating from 1952, a preliminary project of the Overseas Urbanization Office for the Palace of Tourism of Cape Verde (*Boletim*

<sup>2</sup> Between 2012 and 2015 we wrote a PhD thesis precisely on the safeguard of overseas Portuguese architectural heritage from 1930 to 1974. The thesis project developed at ARTIS – Instituto de História da Arte da Faculdade de Letras (University of Lisbon) was awarded a grant from Fundação para a Ciência e a Tecnologia.

<sup>3</sup> On the subject of tourism during Estado Novo see Mariz, V., (2011), *O desenvolvimento do Turismo em Portugal pela 'política do espírito'* de António Ferro, *Turismo & Desenvolvimento*, nº16: pp. 35-48; Cadavez, M., (2013), *A bem da nação: as representações turísticas no Estado Novo entre 1933 e 1940*, tese de doutoramento em Estudos da Literatura e de Cultura apresentada à Faculdade de Letras da Universidade de Lisboa; Pires, E. (2003), *O baile do turismo: Turismo e Propaganda no Estado Novo*, Casal de Cambra. Caleidoscópio; Lopes, F., coord., (2001), *90 Anos de Turismo em Portugal*, Lisboa, DL; Pina, P. (1988), *Portugal: O Turismo no século XX*, Lisboa, Lucidus; Cavaco, C., (1980), *O Turismo em Portugal. Aspectos Evolutivos e Espaciais*, Estudos Italianos em Portugal, nº40-42: 191- 279.

*Geral das Colónias*, 1952, XXVII, nº322). During the summer of the same year, 1952, the IV International Congress of African Tourism was held in Lourenço Marques (*Boletim Geral das Colónias*, 1952, XXVII, nº323). Another testimony of the increasing importance of this activity as an instrument of propaganda lies in the fact that in 1954, the year of the presidential visit of Francisco Craveiro Lopes to São Tomé and Príncipe and Angola, *Portugal País de Turismo* published an issue under the theme of the Portuguese overseas destinations (Andrade, 1954). In 1957, clearly as a consequence of the growing importance of tourism, the new General Agency of Overseas regulation incorporated a Tourism Services Office responsible for, among other duties, the inventory of the overseas touristic values of historic and artistic nature (Decreto nº41 407, 1957). The attempt of the Portuguese government to promote the development of tourism in the overseas territories in the late 1950's is also proven by the fact that in 1958 the *Boletim Geral do Ultramar* published a number of articles written by Pedro Banha da Silva (1901-?), general-agent for the Overseas department, entitled "Tourism in the African territories of south Sahara" (*Boletim Geral do Ultramar*, 1958, XXXIV, nº398; 1958, XXXIV, nº399-400; 1958, XXXIV, nº401). Even in Timor the number of international tourists, mainly Australians, increased during this period (*Boletim Geral do Ultramar*, 1966, XLII, nº494-495). We may also refer to the II National Conference of Tourism held in Lourenço Marques in 1966, during which it was possible to determine the different status of development of this activity in the different Portuguese overseas provinces. Later on, in 1967, eighteen tourist areas were created in Mozambique (Portaria nº20 288, 1967), a proof that, as noted by Carlos Pimentel Costa, one of the dominant topics in that province – where there was still an obvious deficiency of tourism infrastructures (*Boletim Geral do Ultramar*, 1967, XLIII, nº502) – there was precisely an evolution, or the need of evolution, of tourism (*Boletim Geral do Ultramar* nº497-498, 1966). It is also relevant to recall that in 1967 Cape Verde was visited by the general-agent for the Overseas department, the head of the Department of Public Relations and Tourism of the General Agency of Overseas and the director of the Studies and Planning Office of the Commission of Tourism (*Boletim Geral do Ultramar*, 1967, XLIII, nº509-510), a delegation that aimed to study the perspectives of tourism in this province. Likewise in 1969/1970 the general-agent for the Overseas department visited Angola with the purpose of orienting the planning of tourism infrastructures in this province (*Anuário Turístico de Angola*, 1971). To finish, we may refer the promotion of an exchange program by the General Agency of Overseas and the Information and Tourism Centres in late 1960's (*Boletim Geral do Ultramar*, 1968, XLIV, nº521-522).

However we cannot speak about an extraordinary number of cases in which tourism worked as an incentive towards the promotion of conservation or restoration of historic monuments in the Portuguese overseas colonies, nor of the existence of several cases in which this architectural heritage was understood as a tourist attraction. In this regard we can give the example of the minister of the Overseas department, Joaquim Silva Cunha (1920-) who in 1966, in appraisal of the touristic potential of the overseas provinces, did not mention the architectural heritage, but only the landscapes, the hospitality of the people and the variety of habits and customs (*Boletim Geral do Ultramar*, 1966, XLII, nº496). A year later José Fernandes Nunes Barata also mentioned recreational fishing, hunting and natural resources as the future of tourism in the overseas provinces (*Boletim Geral do Ultramar*, 1967, XLIII, nº503). On the other hand, the members of the delegation that travelled to Cape Verde in 1967 aiming to study the perspectives of tourism in this province, despite visiting the historic site of "Cidade Velha" and its temples and fortifications coeval of the first moments of Portuguese occupation of this insular territory, unlike what happened with the weather, beaches, landscapes and kindness of the inhabitants, did not give particular

importance to the multi-centenary architectural heritage (*Boletim Geral do Ultramar*, 1968, XLIV, nº511-512).

Nonetheless, as we will see when analysing the case of Angola, we cannot speak of a total lack of comprehension concerning the Portuguese overseas historic monuments touristic potential, whether as tourist attractions or possible hotel units, having identified mainly cases in which individuals, but also public bodies, have defended and promoted this quality. In this regard we can give the example of Maria Archer that in an article entitled “Zonas de Turismo em Angola” (i.e. Tourist Areas in Angola) published in 1938 in the propagandistic periodical *O Mundo Português*, gave special attention to the forests and deserts filled with animals to hunt, and to the natural beauties as the colony’s greatest attractions, but did not forget the architectural heritage. According to this author the “padrões” (i.g. monuments that were erected in the overseas territories to mark the arrival of the Portuguese navigators, explorers and conquerors) erected by Diogo Cão, the stones of Yelala, the fortress of Massangano, the ruins of the church built by queen Ginga in Matamba or the monument to Silva Porto in Bié, had the potential to satisfy the “*tourist thirsty for the glories of the Past*” (Archer, 1938: 213). Still regarding Angola, we may clarify straight away that the architect Fernando Batalha (1908-2012) understanding the tourist value of the historic monuments of this Portuguese overseas province, would be, for obvious reasons<sup>4</sup>, incomparably much more evident.

Like Fernando Batalha, the architect Luís Benavente (1902-1993) also understood the touristic potential of the Portuguese overseas monuments, such as the previously mentioned site of Ribeira Grande de Santiago in Cape Verde, or simply “Cidade Velha” (i.g. Old City), as an “*ideal site*” (Benavente, n.d. [c. 1970]) for tourism when at the time, during the 1960’s, this activity was mainly confined to the capital city, Praia (*Boletim Geral do Ultramar*, XLII, 1966, nº494-495). The same opinion was shared by the architect Pedro Quirino da Fonseca (1922-2001) regarding Mozambique and Macau, provinces where the development of tourism should be closely related to the protection of the historic monuments, the accentuation of its historic, picturesque, traditional and idiosyncratic character, since tourists were essentially seeking differentiation, “*the territories and places that give them something different, humane and cultural.*” (Fonseca, 1975). At the same time we may refer that the program of the IV International Conference of African Tourism held in Lourenço Marques in 1952 included a visit to the Island of Mozambique and its centenary monuments (*Boletim Geral do Ultramar*, 1952, XXVIII, nº326-327). For his part, in 1950, Renato Maya used the pages of the *Heraldo*, a periodical published in Goa, to present his idea of creating an association devoted to the social, touristic and economic development of the district, whose main goal was the artistic, ethnographic and historic inventory of the territory (*Boletim Geral das Colónias*, 1950, XXVI, nº301). After all, as recognized by the Statistic and Information Services, in Goa “*the Province was prodigal in accumulating the capricious gifts of artistic nature.*” (*Boletim Geral das Colónias*, 1950, XXVI, nº301: 143). To conclude, we can refer that two of the duties of the previously mentioned Information and Tourism Centres created in Angola, Mozambique and Portuguese India in 1959 were to “*promote, when required, the collection and conservation and protection of the artistic, historical and cultural heritage*” (Decreto-lei nº42 194, 1959: 312) and to make an inventory of the touristic values needed for the preparation of touristic maps that should have historic monuments as specific subjects of interest (Decreto-lei nº42 194, 1959).

<sup>4</sup> Fernando Batalha was a Portuguese architect that spent most of his life in Angola. In this Portuguese overseas province, as architect of the Public Work’s Service of National Monuments and member of the Commission of National Monuments, Batalha was responsible for several restoration works of historic monuments, for their inventory, protection, study and promotion. On the subject see: Mariz, V. (2014), Fernando Batalha: a actividade na Comissão de Monumentos de Angola e a relação com o Brasil (1935-1974), De Viollet-le-Duc à Carta de Veneza – Teoria e Prática do Restauro no Espaço Ibero-Americano, Lisboa, ARTIS – Instituto de História da Arte e Laboratório Nacional de Engenharia Civil: 323-330.

### 3. TOURISM AND HISTORIC MONUMENTS IN ANGOLA DURING ESTADO NOVO

At least from the 1920's onwards, if not before, this is, during the government of José Norton de Matos (1867-1955), the understanding of the importance of tourism and of the touristic potential of Angola started to increase. In fact, the development of tourism was one the issues that caught the attention of Norton de Matos who, as High Commissioner or Governor General, understood that this activity could indirectly contribute to the colonization of Angola. Such colonization should be assured through the creation of several elements of civilization such as hotels and restaurants, strategically located in places visited by tourists that went to Africa looking for its natural beauties. Thus, we can explain the fact that Norton de Matos, as the first High Commissioner of Angola, created the Tourism Services and published several decrees that encouraged the construction of "*comfortable hotels*" (Matos, 1926: 44-45). However, in 1926, Norton de Matos himself noted that: "*These measures have failed*" (Matos, 1926: 44-45).

As noted by the ethnologist and anthropologist José Redinha (1905-1983) (*Anuário Turístico de Angola*, 1969) Angola tourism entered its modern phase in 1959 within the creation of the Information and Tourism Centre. This public body was created in March 1959 (Decreto-Lei nº 42 194, 1959) and regulated later on the same year, in November (Diploma Legislativo nº3:014, 1959). Later on, in 1961, there was an organizational restructuring of the centre (Diploma Legislativo Ministerial nº40, 1961). The creation of the Information and Tourism Centre is particularly relevant within the context under study because from then on the Portuguese government could say that Angola had a "*public body sufficiently qualified to guide and propel tourist activities*" (Diploma Legislativo nº3:014, 1959: 821). At the same time a network of local tourism bodies, such as city halls assisted by municipal commissions of tourism, tourism boards and regional commissions of tourism, was created.

In order to achieve its goals, the Information and Tourism Centre, which was dependent on the province's Governor General, was divided in two sections in addition to the technical services and secretariat: the Section of Information and Culture and the Section of Tourism, Hotel Industry and similar services. These sections were responsible, among other duties, to "*Promote, when required, the collection and conservation as well the protection of the artistic, historical and cultural heritage of Angola*" (Diploma Legislativo nº3:014, 1959: 823). The centre also had, in accordance with the guidelines provided by the General Agency of Overseas, the incumbency to identify the touristic value of the province needed for the elaboration of touristic maps regarding ethnography, linguistic, musical folklore, hunting and recreational fishing, landscapes, tourist areas and routes and, the most important aspect within this paper, monuments. Additionally, the public body created in 1959 was also responsible for the divulgation of the "*natural beauties, artistic richness, monumental heritage and the geographical picturesque of Angola, aiming to develop tourism by producing publications or by using the press, the cinema, the radio or the television.*" (Diploma Legislativo nº3:014, 1959: 824). It is also important to note that at that moment the creation of areas and regions of tourism was also predicted as a way of enhancing and protecting sites where there were beaches, hydrological, health, altitude, leisure or recreation resorts, national parks, public hunting concessions or sites especially suited to recreational fishing, and, once more, historic or natural monuments. Thus, we can conclude that in 1959 the Angolan provincial government had a true understanding of the touristic value of the historic monuments as well of the importance of promoting their protection within a more comprehensive development plan for Angola's tourism.

Regarding the activity of the Information and Tourism Centre of Angola it is interesting to note the presence of multiple references to historic monuments in their publications,



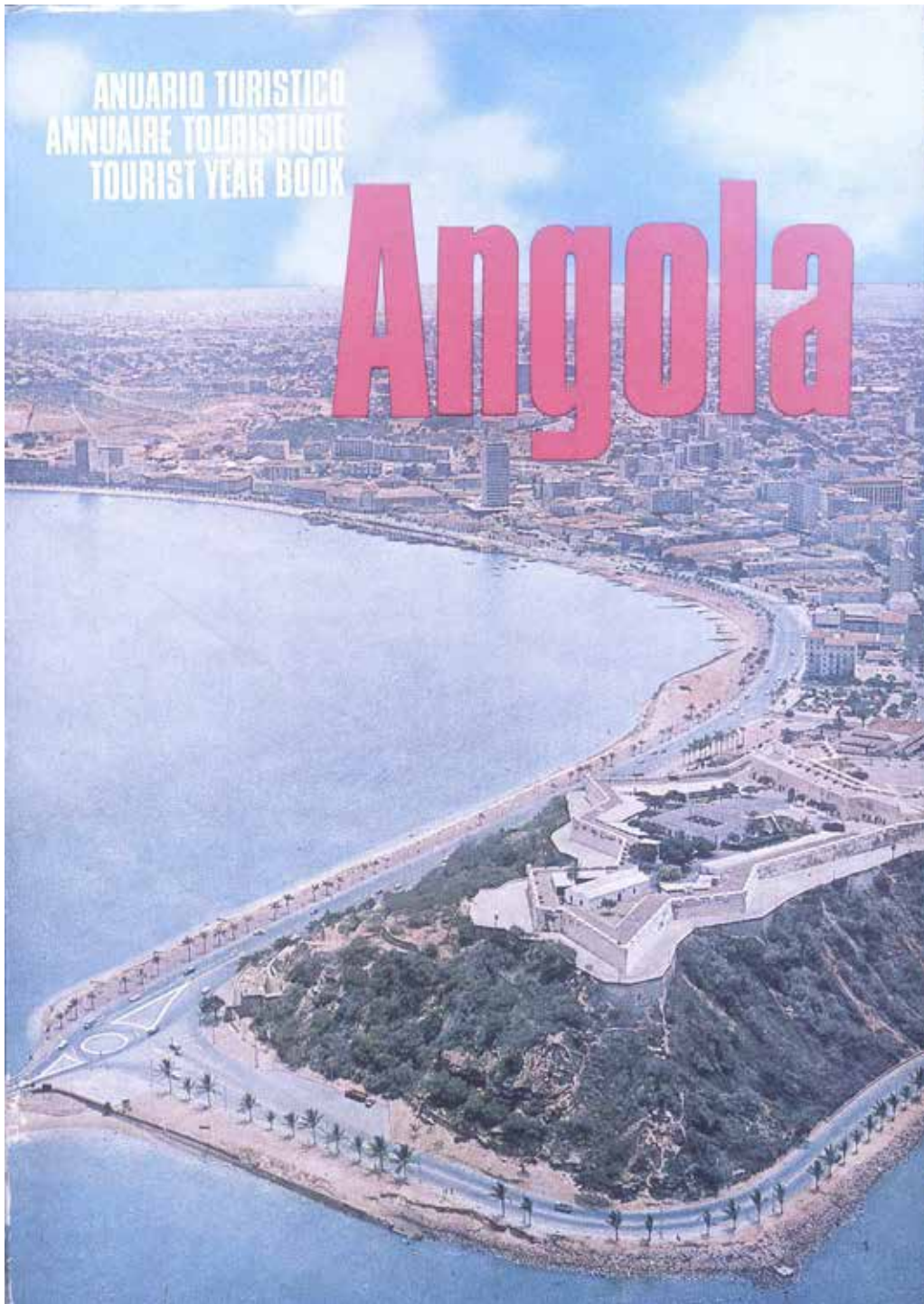
effective instruments of tourism promotion and propaganda. The undated *Angola, Portugal, Guia do Visitante*, a travel guide probably from the mid-60's, is an excellent example because it has a photography of a bulwark of the iconic fortress of Saint Michael (Luanda) on the cover and many other images of historic monuments illustrating the content. In this guide, as it was usual at the time due to the regime's nationalist and triumphalist mentality and its understanding of historic monuments as testimonies of the Nation's greatness and legitimisers of the Portuguese colonialism, the fortress of Saint Peter, the church of Our Lady of Nazareth, the church of Our Lady of the Cape, the former Jesuit church of Jesus or the church of Our Lady of Mount Carmel were presented and highly praised as evidences of the "faith of a People that wanted to be great." (*Angola, Portugal, Guia do Visitante*, n.d., n.p.). Obviously for this reason, these and other historic monuments were announced as tourist attractions along beaches, landscapes, dams, waterfalls, game reserves or coffee plantations. Thus, according to the Information and Tourism Centre guide when in Benguela the tourist could visit the church of Our Lady of Popolo, Catumbela village and the redoubt of Saint Peter which were identified as national monuments, which proves the importance of these ancient and highly symbolic constructions, and demonstrates the level of detail of this publication. As in other publications the Dondo, Massangano and Cambambe tourist triangle was highly recommend in this guide precisely because of the "incalculable historical value" (*Angola, Portugal, Guia do Visitante*, n.d., n.p.) of this area extraordinarily rich in monuments. Different monuments of Huambo, Zaire or Moçâmedes were also presented as tourist attractions and testimonies of the antiquity (and legitimacy) of the Portuguese colonial administration. Finally, we must mention the reference to the location of the temple of Our Lady of Nazareth and the fortress of Saint Michael in a Luanda map and the presence of a list of the national monuments and buildings of public interest along with other useful general information about the capital city.

In 1966 the Information and Tourism Centre of Angola published *Itinerários de Angola*, a guide of itineraries for tourists. Then the growth of tourism in this Portuguese overseas province was already perceptible, as shown by the "encouraging phase" of tourism between Angola, the Republic of South Africa, Southwest Africa and Southern Rhodesia, mainly due to the movement and activity of students, journalists, business men and public figures (*Itinerários de Angola*, 1966). The truth is that on this occasion the historic monuments of Angola were once again understood and disclosed as tourist attractions and, consequently, points of interest within some of the several options that were available. For example, route A, from Nôqui to Pereira de Eça, included stops to see the ruins of the Ambriz fortress, the monuments and museums of Luanda or the architectural heritage of the Cambambe, Oeiras and Massangano tourist triangle, among others (*Itinerários de Angola*, 1966). The fortress and church of Muxima, correctly (and proudly) identified as national monuments that played an important role in the 17<sup>th</sup> century conflict between Portugal and Holland, were, along the redoubt of Saint Peter of Catumbela, points of interest of route E that connected Luanda to Sá da Bandeira. Despite these examples that prove the understanding of the touristic value of historic monuments and the fulfilment of the Information and Tourism Centre of Angola, it is important to clarify that these itineraries comprised, mainly, other types of tourist attractions, such as beaches, local art, hunting or catholic missions.

Meanwhile the promotion of the tourism potential of Angola was also made in the metropolis through several public or private publications. One of these periodicals that had its first issue published in 1963/1964 was the trilingual (Portuguese, French and English) *Anuário Turístico de Angola* (i.e. Tourist Year Book) whose third number had on the cover an aerial photography of the previously mentioned fortress of Saint Michael (*Anuário Turístico de Angola*, 1969 - Figure 1). The contents are not particularly different from the ones published by the Information and Tourism Centre of Angola and, once again, we have identified

several proofs of the considerably disseminated understanding of the architectural heritage as a tourist attraction, such as the list of the main national and historic monuments with references to the location and, less frequently, epoch; or mentions of the historic monuments of Luanda as points of touristic interest within a number of excursions.

Figure 1. Cover of the *Anuário Turístico de Angola* (1969) with the fortress of Saint Michael

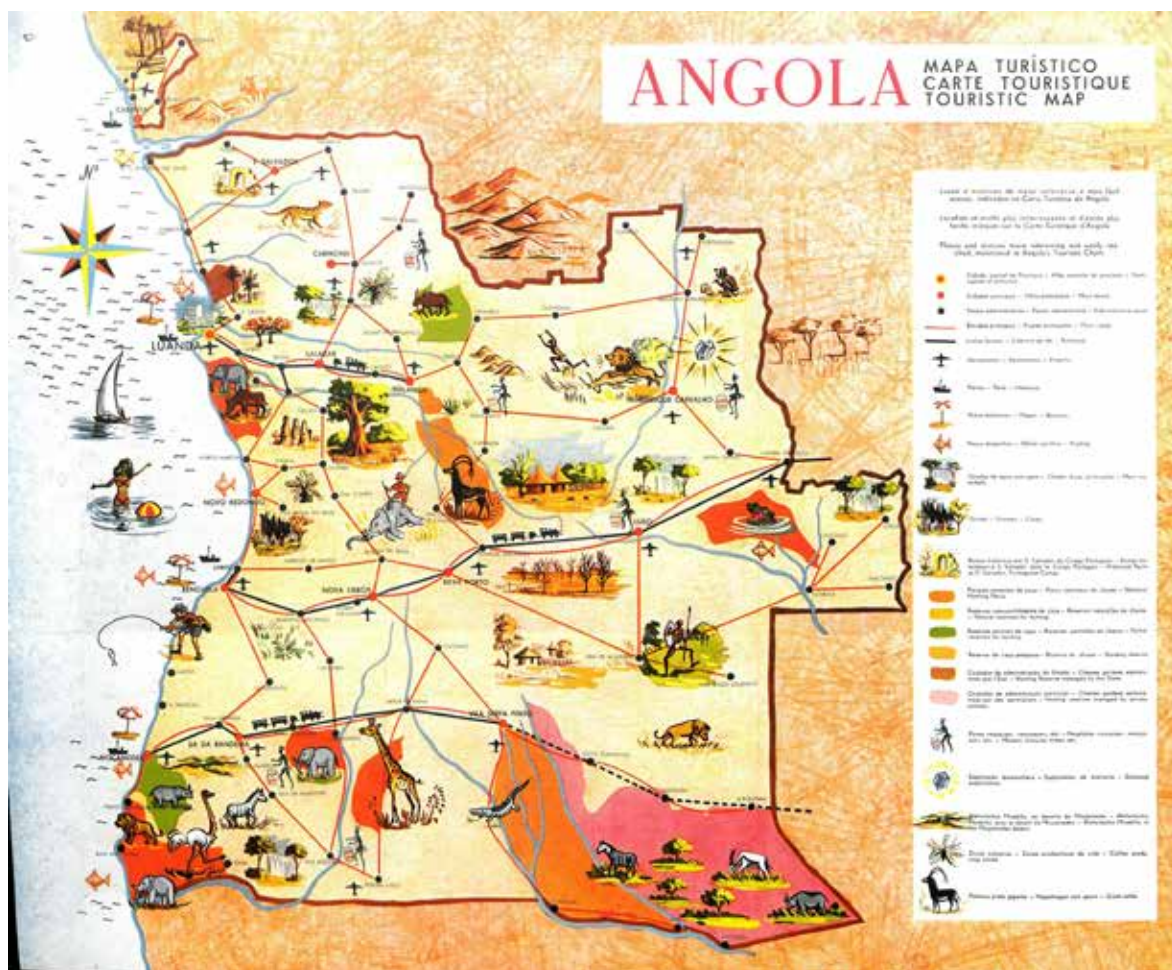


The architectural heritage of Portuguese origin existent in Cambambe, Massangano and Nova Oeiras was, once again, recognized and disclosed as “*historical ruins*”, “*relics from the Past*” (*Anuário Turístico de Angola*, 1966-1967: 237) and, consequently, tourist attractions of



North Kwanza. It is also fair to say that some of the references, such as the ones regarding the temples of Our Lady of Nazareth, Our Lady of Mount Carmel, Our Lady of the Conception or the church of Jesus, are considerably rich in historic/traditional details – original function, artworks, restoration works, etc. – that prove and improve the importance of these monuments as historic or artistic relics. Finally, we must mention the coloured touristic map of Angola (Figure 2) with a symbol and respective caption for the ruins of the former São Salvador do Congo's (or M'banza Congo) cathedral (*Anuário Turístico de Angola*, 1966-1967), the temple frequently known as the first church built in the Sub-Saharan Africa (1548) by Jesuit missionaries and, therefore, a testimony of the centenary Portuguese overseas evangelization mission.

Figure 2. Touristic map of Angola with the symbol and respective caption for the ruins of the former São Salvador do Congo's cathedral (*Anuário Turístico de Angola*, 1966-1967)



The architect Fernando Batalha raised the issue of tourism several times as we can understand, for example, from reading the numerous articles written in the *Boletim do Instituto de Angola* (1953, nº1; 1953, nº2; 1955, nº7), true travel guides at a time that tourism in Angola was still very incipient. In fact, as we have seen happening in Cape Verde or Mozambique, in Angola the potential of historic monuments as “*elements of tourist attraction*” (Batalha, 1963: 6) was understood, even though this was an aspect that without being properly explored until the 1960's, was constantly threatened by the new urbanization plans that caused in Luanda, for example, the demolition of centuries-old buildings, testimonies of the ancient Portuguese presence and of the distinctive character of the capital city. Thus,

according to Fernando Batalha: *“Instead of destroying the beauty, the picturesque and the character of the architecture and of the ancient urban sites, that gave to Luanda a unique and unmistakable feature, it would be better, therefore, that they were better used, esteeming and refining them”* (Batalha, 1963: 7).

However Luanda was not the only city whose architectural heritage, classified or not, had the potential to attract national and foreign tourists or to intensify the promotion of this overseas province, the qualities of the Portuguese civilizing mission and, last but not least, the growth of its economy. In fact, in our opinion, the restoration of the historic monuments of Massangano over the 1960's was always guided by a very clear intention of making this place – whose history was closely related to the Portuguese occupation and resistance in Angola – a major tourist site. After all, over this period the patrimonial services aimed not only to repair or restore the church of Our Lady of Victory, the fortress, the Courthouse, the Town Hall, the church and Hospital of Mercy, but also to recover all the surroundings, to intensify the historic ambiance through the placement of antique style lamps, the reparation of roads and popular houses according to the traditional methods and forms and, inclusively, the transformation of a building in a tourist inn (Batalha, 1968). This value of Massangano as one of Angola's most important tourist resorts was so obvious to Fernando Batalha that he even suggested that the III Development Plan for Tourism should benefit the restoration campaign to be held in this site (Batalha, 1968).

Another example of such understanding of the historic monuments and sites as tourist attractions is Dondo village, the former place of a well-known 17<sup>th</sup> century market and the most important commercial hub of Angola's hinterland region over the next century, which, however, in the beginning of the 20<sup>th</sup> century, as a consequence of the alteration of the commercial routes and the construction of the railway between Luanda and Ambaca (Batalha, 1962), started to decay. Therefore the architectural heritage coeval of the commercial prosperity epoch – the typical “sobrado” houses – were slowly abandoned or destroyed, a situation that led Fernando Batalha to defend the protection of Dondo, having insisted mainly in the importance of classifying the site as a *“village of historic, archaeological and touristic interest”* (Batalha, 1963b: 13). With regard of this suggestion it is important to observe that Fernando Batalha's main argument was the fact that this situation was already a reality in the metropolis, namely in Évora, but also in Ouro Preto, Brazil. Objectively, with the classification of the village of Dondo Fernando Batalha was expecting to stop the impetus of the construction sector that in several occasions had dictated the destruction of ancient buildings valuable not because of their refinement but because of their picturesque character, their *“impressive unity of style, maybe inferior and rudimentary, that gave them a personal and differentiated touch”* (Batalha, 1963b: 1945). Since this interest of Dondo was closely related to its touristic potential and with the unique character of its buildings, as far as Fernando Batalha was concerned, the safeguard of this site should be assured by the patrimonial services but also by the tourism services, therefore it was desirable that the official entities responsible for the safeguard of the historic and cultural heritage of Angola and the ones responsible for tourism did *“not forget to care a little for Dondo and to take the appropriate actions to stop the disfigurement that this village has been condemned to because of the general disinterest and foolishness”* (Batalha, 1963b: 14).

On the other hand, we have observed that regarding Dondo, Batalha, when in comparison with other sites, this village had unquestionably the greatest touristic potential of Angola. This because, despite the extremely hot weather and insalubrity – that itself could contribute to the fact that this idea may have seemed “a little pretentious and foolish” (Batalha, 1962: 11) – the localization of Dondo, near Muxima, Massangano, Cambambe or Nova Oeiras, gave this village the potential of being an important touristic destination.

It is also important to mention that, in 1967, Alfredo Diogo Júnior also insisted on the importance of tourism and the relation of this activity with the historic monuments of Angola. In his article entitled “Valores Históricos do Turismo de Angola” (i.g. Historic values of Angola’s Tourism) and published in the *Boletim do Instituto de Angola*, the author, by defending that the “*tourist of our time is no longer the man that spends holidays, but the one that goes – even for a single day – outside his country or home*” (Júnior, 1967: 93), presents Angola as a touristic destination rich in historic monuments and sites, such as the historic-touristic triangle of Muxima/Massangano/Cambame, a valuable testimony of “*a remarkable story of sacrifice and heroism*” (Júnior, 1967: 94). However, in our opinion, the most important aspect of this article lies in the focus on the museums, archives and libraries of Angola that were presented by Alfredo Diogo Júnior as elements of interest to several scholars, and in the necessity of organizing regular conferences and holiday courses, events that could have the potential to encourage the growth and deepen diversification of tourism in this Portuguese overseas province.

Despite these contributions, both public and private, tourism did not grow in Angola as expected and wished by the Portuguese administration. As noted in 1969 by José Redinha, “*Nothing lacks in Angola: primitive splendour, wild nature, interesting tribes, historical testimonies of a several centuries-old Portuguese presence*” that are “*profoundly evocative of an old colonization*” (*Anuário Turístico de Angola*, 1969: 8), but a bigger and more efficient investment in tourism, or in other words, the construction of roads, hotel facilities, restaurants and the inculcation of a so-called “tourist mentality” orientated towards the attraction and satisfaction of the visitor. On the other hand, Mário Pirelli (1964), for whom the safaris and game parks should be presented as Angola’s main attractions, noted several times during the late 1950’s and 1960’s that the lack of a well-thought tourism-oriented propaganda was a serious impediment to the development of this industry and business: “*The Germans, the British, the French, the Scandinavians (...) are not informed that Angola could suit them as well as Kenya, South Africa, Morocco, Egypt, the most visited countries by tourists. The reason is the complete lack of propaganda.*” (Pirelli, 1964, n.p.). Furthermore, according to Pirelli, the already existent but clearly insufficient instruments of propaganda – such as the previously mentioned official publications – should be totally re-evaluated and re-thought bearing in mind the United States of America’s example, and its potential as an “*integral part of our fight in the political arena.*” (Pirelli, 1964, n.p.). In fact, the understanding of the propagandistic potential of tourism in a context marked by the highly controversial colonial issue and the Portuguese colonial war is extraordinarily interesting and, in our opinion, deserves a separate study as a subject in itself.

#### 4. CONCLUSION

Altogether, it seems that we can accept that the development of tourism in the Portuguese overseas provinces, and especially in Angola, was accompanied by an increasingly wider understanding of the touristic value of the historic monuments existent in these territories. With regard to this topic of study, we have also come to the conclusion that the supporters of the touristic potential of historic monuments, mainly the ones classified as having national interest, were simultaneously defenders of the need to preserve the ancient characteristics, an idea that we can associate to the thought of António Ferro, to whom the success of national tourism was highly dependent on preserving and emphasizing the historic, picturesque and idiosyncratic characteristics of those ancient buildings. Thus, we can consider that this reality, that is, the development of tourism in Angola and other overseas provinces and the progressively wider understanding of the touristic value of historic monuments, was

substantially influenced by the example of the metropolis where from the 1940's onwards, when tourism came under the aegis of the Secretariat of National Propaganda, there was a strong increase of this activity as proven, among other aspects, by the restoration and adaption of former convents and fortifications to charming hotel units. Finally, even though we may accept that the modern phase of tourism in Angola has started with the creation of the Information and Tourism Centre of Angola that, in fact, was responsible for stimulating, when required, the collection, conservation and protection of the artistic, historical and cultural heritage, it is also imperative to recognize the importance of the major contribution of the architect Fernando Batalha in the development and deepening diversification of cultural tourism in contrast to the better-known fishing or hunting tourism.

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# CIVIC PARTICIPATION AND PUBLIC SPACES: A KEY FACTOR FOR SUSTAINABLE TOURISM IN HISTORIC CITIES

*Martin van der Zwan<sup>1</sup>*

## ABSTRACT

Attractive public spaces are crucial for tourism. After all, most tourists that visit a city, experience it by foot and increasingly by bicycle.

Public spaces have to meet a few minimum requirements. If not, tourists will feel uncomfortable. For instance; a lot of rubbish and graffiti, worn out and damaged street furniture can cause a feeling of unsafety. Attractive public spaces are the ones that invite tourists to stay a bit longer than strictly necessary and sit down and relax. Some of these spaces are quiet and green, others more vibrant, well dimensioned and furnished.

In this paper I describe a method for defining and measuring the quality of public space and also for predicting the conclusion tourists may draw based on this; “will I revisit this place or not ?”

In some cities inhabitants, local shop owners and local institutions voluntarily take the initiative to upgrade the quality of public spaces or even act as ‘city hosts’ to welcome visitors. These kinds of civic participation help to provide the unique experience many tourists are looking for.

Keywords: Quality of Public Spaces, Integral Management of Public Spaces, Hospitality, Civic Participation.

JEL Classification: Z39

## 1. INTRODUCTION

Tourism is on the increase the world over. In the first half of 2015 it grew by four percent compared with 2014. In total, 21 million more people worldwide took a holiday (UN World Tourism Organisation, 2015). This is due, amongst other things, to the growth in the middle classes. People have more free time and more money. Until the 1950s, holiday-making in Europe was primarily the preserve of the rich. In addition, there has been a significant increase in the number of people who can travel freely, people from Russia and China for instance, and flying has also become far cheaper.

In many cases tourism is a welcome source of income and creates jobs for the local population. It also helps improve shopping facilities and leads to increased funding for museums etc. And money is made available to invest in the regeneration of public spaces.

But tourism can also have a less positive impact. For example, the cost of supermarket food and the cost of housing can increase, making these less affordable for local people. Other issues may include less social behaviour, litter and a shortage of drinking water.

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At the same time there are a lot of opportunities to stimulate sustainable forms of tourism. More and more tourists are looking for a unique experience, for authenticity, which brings them into contact with the locals. If they are to benefit from this, destinations must stand out from the crowd and deliver real quality. A quality that visitors will rate as 9.5 out of 10. That way, visitors will happily return and will act as ‘ambassadors’ for the city.

In this article I will show you how public spaces can play a crucial role in this. Good public spaces can help make visitors feel as though they’re visiting friends and they will behave accordingly. You could call this ‘friendly tourism’.

Focusing on ‘friendly tourism’ is increasingly important now that, with the increasing use of social media and comparison sites and, more generally, the availability of information online, news of potential ‘issues’ with a destination can spread like wildfire all over the world.

Clearly however, this also brings with it opportunities: a good location can quickly reach the desired target groups and ‘tempt’ them to visit.

In this paper I will consider urban tourism, city breaks and, more specifically, the ability of good public spaces to generate sustainable tourism.

I will look at the following, in that order:

1. The importance of public spaces for tourism.
2. The characteristics of a tourist ‘friendly’ public space.
3. A method for measuring the friendliness of public spaces.
4. The impact of engagement and active civic participation on the friendliness of public spaces.
5. The example of the Vondelpark in Amsterdam.

## **2. THE IMPORTANCE OF PUBLIC SPACES FOR TOURISM**

There are many factors that make a city an attractive destination for a city break: tourist sights, museums, historic buildings, a plentiful supply of accommodation in different price brackets. But vibrant streets, attractive parks, ‘buzzing squares’ and places to meet are often also crucial factors in a city’s appeal to visitors.

In this context, public spaces are often important but, in my opinion, they are not always given the attention they deserve in municipal authorities’ policies on tourism.

Before we look at these issues in more detail, a clear definition of public spaces is needed. This paper focuses on the definition described by Benn & Gaus. (Benn & Gaus, 1983). They describe public spaces as a place (1) socially and physically accessible to all, including the activities in it, (2) controlled by public actors which act on behalf of a community and used by the public, (3) which serves the public interest. Examples of these spaces are streets, squares and parks

Public spaces can have various functions. One important function is to connect and transport people, goods, energy, waste and water. Public spaces of course also provide access to houses, shops and businesses and they fulfil a social function, providing a space for meetings, recreation and markets. They can also be used to store water for irrigation and for drinking and offer opportunities for nature and landscape.

What’s more, there is a growing recognition that green public spaces have a very positive impact on people’s health. They reduce stress and promote vitality and social contact because green spaces encourage people to be active (Hamer M. & Chida Y., 2010). Besides this, the economic value of homes that have a view of a park, lake or river is several percent higher

than that of comparable homes without such a view (Visser P & Dam van F., 2006; CROW, 2012).

How important are public spaces for tourism? Very important! Public spaces are crucially important both in terms of the visitor experience and in terms of the wellbeing of local residents and businesses. Not least because, when visiting the city, visitors spend much of their time outdoors. And they also get a real feel for the public spaces because they generally get around the city on foot or by bike. Local residents temporarily share the public spaces with visitors. And that's where they encounter the majority of the 'impact' of their presence. This is often regarded as positive, e.g. in terms of meeting new people, but sometimes it is regarded as somewhat less positive, e.g. due to crowded places, the mess left behind by and less social behaviour of some tourists (Neuts B. & Nijkamp P. & Leeuwen van E. 2012).

It is crucial therefore that the quality of public spaces is good. In other words, they must be clean, safe (Elffers, H. en De Jong, W., 2004), vibrant and attractive.

In recent decades many European cities have done a great deal to improve their public spaces. Barcelona was one of the first cities to invest heavily in making the city more attractive for visitors and residents. This was done with a view to the Olympic Games in 1992. Squares, parks and boulevards were improved and cars were banned from several places in the inner city. Copenhagen did this even earlier. Shopping streets were made traffic free from the late 1960s, leaving more space for terraces for alfresco eating and drinking and for people to 'amble' and shop. A large number of terraces sprung up and these are still in full use today. The University of Copenhagen researched this consecutively for a number of years from 1968 onwards. They found that the number of pedestrians and terraces and the length of time visitors spent in the city centre increased significantly as more roads were made traffic free (Gehl J. & Gemzoe L., 1996). Many Dutch cities followed this example, and large areas of virtually all city centres in the Netherlands are now traffic free, which has created vibrant, attractive shopping areas and squares with terraces for eating and drinking outdoors.

Such public spaces also encourage visitors to the city to stay longer than is strictly necessary. And even better.... they come back for more!

Improving public spaces can increase the appeal of a tourist destination. However, if we are to take full advantage of this, we have to know what characteristics public spaces must have if they are to offer tourists the desired '9<sup>plus</sup> experience'.

### 3. THE CHARACTERISTICS OF A TOURIST 'FRIENDLY' PUBLIC SPACE

People have been trying to define the concept of quality since time immemorial. Around 60 BC, Roman builder Vitruvius used the terms *Utilitas* (functionality), *Venustas* (attractiveness) and *Firmitas* (durability) to describe the quality of buildings. (Vitruvius Pollio, 2010). Fred Kent, founding father of the US organisation Project for Public Spaces (PPS-org) has devised a very detailed set of quality criteria. These are grouped into four main categories; Comfort and Image, Access and Linkage, Uses and Activities and Sociability. Essentially, they all relate to the use of public spaces for social purposes. In other words, it's all about the extent to which the space is used by people for sitting, walking, playing, exercising, chatting and generally being friendly to each other (Project for Public Spaces Inc., 2000)

Jan Gehl devised his own 'measurement method' for measuring the quality of public spaces and also focused entirely on the 'social quality' of public spaces. The quality of a public space is good if it encourages people to walk, sit, play and exercise and to talk and listen to each other (Gehl J. & Gemzoe L. & Sondergaard S., 2006). Gehl works on the basis of 12 key quality criteria which he sub-divides into three groups: protection, comfort and

enjoyment. These can be used to evaluate a location; a score being given on three levels for each of the criteria. The PPS method doesn't evaluate quality at different levels.

The methods devised by PPS and Gehl offer many useful points of reference for evaluating the tourist 'friendliness' of public spaces. However, there are a number of improvements that could be made to the measurement method. These relate to:

1. The weighting of the various criteria.
2. The importance of maintenance, sustainability, parking facilities for cars and bikes.
3. Further refinement of the criteria on the basis of which the quality of a place is established.

In this paper I describe a method for 'measuring' the quality of public spaces<sup>2</sup> (PLAN Terra, 2011) which takes these three points for improvement into account.

I define the quality of public spaces on the basis of six *key quality criteria*<sup>3</sup>

1. Safety
2. Functionality
3. Maintenance
4. Social use
5. Attractiveness
6. Sustainability

*Re 1. Safety:* On the one hand, this includes public perception of safety, which is influenced by the presence of social control, people/'eyes' on the street, the absence of dominant groups and adequate lighting. On the other hand, it includes any offences, robberies and other types of crime which are known to have been committed there.

*Re 2. Maintenance:* The maintenance criterion indicates how clean the public space is. In other words, is it free from litter, graffiti, illegal posters and stickers, dog waste, leftover food and illegally dumped waste? The extent to which the facilities are intact and in good working order is also assessed. E.g. paving, lighting, drains and furniture, such as benches and waste bins.

*Re 3. Functionality:* Functionality refers mainly to the transport function of the public space. To what extent is the space conducive to safe cycling, walking and driving? It also looks at the accessibility of the space for people with visual or physical disabilities, and considers whether the transport system has enough capacity to prevent traffic jams, queues or parking problems. A public space is also deemed to be functional if it is conducive to the transportation of water, energy and waste. i.e. there is no flooding, the drainage system has sufficient capacity and there are no power cuts.

*Re 4. Social use:* The social quality of a public space is determined on the one hand by how vibrant it is and, on the other, by the social interaction between users and the extent to which users engage with the public space. By vibrant we mean events, markets and lots of people walking, cycling and sitting. Social interaction and engagement means users making contact with each other, talking to each other, playing or exercising together.

*Re 5. Attractiveness:* An attractive public space has a design that attracts people's attention through a harmonious choice of materials, water, green spaces, trees and plants. Sometimes there are references to the history of the site. In addition, the space has been designed with the 'human dimension' in mind, squares are clearly defined and the design has not been

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<sup>2</sup> This method is developed and applied by PLAN terra in several quality scans and policy plans on Public Space in several Dutch cities in the period 2006 -2016. Example PLAN terra (2006 and 2015); *Quick Scan kwaliteit openbare ruimte gemeente Den Haag*; PLAN Terra (2006, 2016)

<sup>3</sup> These criteria are based on the method of describing and measuring quality of public spaces by both Jan Gehl (1996 / 2006) and Project for Public Spaces (2000)

cluttered with a lot of furniture and posts and poles. The space has also been designed in such a way as to provide protection from wind, rain and sun.

*Re 6. Sustainability:* A public space can also contribute to sustainable development. By this we mean not only that it promotes nature and ecology but also that it prevents the pollution of water and air and helps to counter 'heat stress'. On the other hand, when designing and managing the public space, efforts can also be made to keep CO2 emissions to a minimum, to avoid the use of finite resources and to reuse materials wherever possible.

These six criteria are not all of equal importance. Visitors will attribute more importance to some aspects than to others. If part of a public space is regarded as unsafe, due to crime, serious issues with waste or signs of wear and tear and neglect, any 'designer benches' that may have been installed there will go unused. This will also be the case even if it scores well on the other criteria. Conversely, if a public space is deemed to be a safe place and it is functional but a bit cluttered but still very vibrant, the tourist will still give it a good rating. This will still be the case even if the design of the space is very basic and little attention has been paid to sustainability.

To create some structure here, we can use the principles of Maslow's Pyramid<sup>4</sup> We can specify, for example, that tourist locations in historical cities must meet basic requirements. These are: public safety, functionality and an adequate level of maintenance. If a public space doesn't score well on these factors, the visitor's overall experience will automatically be unsatisfactory. These are essentially 'dissatisfiers'. If they are not right, dissatisfaction will result. A 'good' for these aspects will not (or will hardly) lead to a higher degree of satisfaction. In fact, in the event of anti-social behaviour: if visitors make a mess and nothing is done about it this will encourage others to do the same or to behave in other socially unacceptable ways. This phenomenon is known as "the broken windows theory" (Wilson, J.Q. en G.L. Kelling, 1982).

Figure 1: Hierarchy of key quality criteria



Source: PLAN terra BV (2016)






<sup>4</sup> Maslow A. (1940). Hierarchy of Needs motivational model principles. Motivation theory which suggests six interdependent levels of basic human needs (motivators) that must be satisfied in a strict sequence starting with the lowest level

Conversely, a ‘good’ for visitor experience can be created by investing more in attractive design, more green space, colour and flowers, art and sustainability. The latter can be achieved, for example, through the use of electrically driven road sweepers and by separating different types of waste. But the most important thing is the social quality of a space! The opportunity to sit in a square, watch people or even meet other people has an extremely positive impact. That’s what most tourists come to a city for. It’s a popular thing to do between visits to museums, sights etc. and can make the difference between a mildly positive experience and a truly exceptional one.

And visitors have an uncanny knack of sensing the atmosphere at specific spots in the city, and will use it as the basis for deciding whether or not to return in the future.

In this context, I distinguish five different ‘levels of experience’ and the associated conclusions:

**Figure 2: Levels of tourist experience and associated conclusions**

Grade	The experience	Revisit?
1 - 4	 Very unpleasant	I will definitely not revisit this place.
5 - 7	 Unpleasant	I will probably not revisit this place.
9 - 13	 Not special	I am not sure whether I will revisit this place.
14 - 16	 Pleasant	I will probably revisit this place.
17 - 20	 Very pleasant	I will definitely revisit this place.

Source: PLAN terra BV (2016)

The ‘very pleasant’ experience is the highest level, at which point the visitor can give the city the desired 9+ rating as a destination, and, at this level, the public space could be classified as a ‘friendly public space’.

#### **4. A METHOD FOR MEASURING THE FRIENDLINESS OF PUBLIC SPACES**

In order to make it possible to determine the ‘friendliness’ of a public space, three levels have been defined for all the key quality criteria: The quality can be: inadequate, adequate or good. A smart definition of the differences has been made using a number of core concepts and two photographs by way of illustration.

In all, twelve of such quality measures have been drawn up; two for each of the six key criteria. Example:

*Key criterion “Maintenance” – sub criterion “Clean”<sup>5</sup> (CROW, 2013)*

**Level C:** The public space is dirty, which has a detrimental effect on the visitor experience. Litter, chewing gum, weeds and dog waste are visible all over the place and facades and objects are covered in graffiti, posters, slogans etc. The overall picture is one of annoying uncleanness.

**Level B.** The public space is moderately clean. There is some rubbish around but visitors do not experience it as annoying. The area is rather weedy and there is litter here and there, and chewing gum and some dog waste. Facades and objects are covered to a limited extent in graffiti, posters, slogans etc.

**Level A.** The public space is clean. There is hardly any rubbish to be seen. There are very few weeds and the streets are virtually free of litter and chewing gum. Graffiti, posters etc. are almost entirely absent.

**Figure 3: Catalogue with quality scales for the public space (written in Dutch); examples for Maintenance/ Clean, Safety and Attractiveness**



Source: (PLAN terra BV, 2011)

Quality can be determined in a number of different ways. You can start by looking for the presence of physical criteria for the key quality concerned. But it's more important to evaluate the impact of these physical criteria. The user's perception of what is on offer is crucial here.

For example, you can determine the quality of a public space in terms of its maintenance/cleanliness by checking that there are enough litter bins in the public space and counting the amount of litter on the street. How residents and visitors rate the city in terms of its cleanliness is also important. This can vary from one target group to another. What an older

<sup>5</sup> Based on the method for measuring quality of maintenance by CROW; the technology platform for transport, infrastructure and public space in Holland.



couple may regard as filthy, a group of students on holiday may find perfectly acceptable. In other words, they will perceive the same situation in different ways.

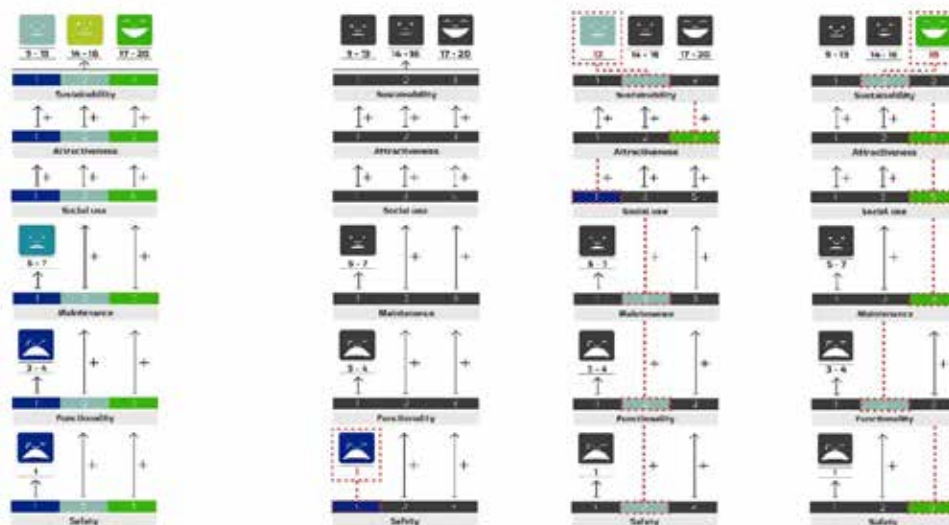
When determining the quality of a public space you can use various sources and research techniques, e.g. counts, technical measurements, observations, interviews with visitors and surveys. And, increasingly, use is being made of the fact that nowadays virtually everyone has a mobile phone, which allows visitor movements in the city to be mapped at meta level.

Visitors and residents rate a city's public spaces based on their overall feel, and draw conclusions as to their 'friendliness' on this basis. The municipal authority must keep its finger on the pulse. In what respects is the quality of the city's public spaces not up to the mark or does it not meet expectations? This allows the appropriate action to be taken to improve the quality of the space. It's also important to make an overall evaluation of the quality of the various locations in the city that visitors visit. This is important in order to obtain an overview of the worst locations and routes. Tackling this can make a huge difference.

As I stated earlier, not all the key quality criteria have the same weight in terms of users' perceptions of a public space. Consequently, it's not enough simply to add the scores (quality levels) for the six quality criteria together to produce an average score.

For this purpose, the method described here includes an 'intelligent' weighting of the various criteria. Thus, for example, an adequate score (score B) for personal safety is a prerequisite for the achievement of an adequate score for the overall quality of the public space concerned. The total score can vary between zero and 10. Scores 1 to 4 represent 'very unpleasant', and scores 5 to 7 'unpleasant'. Scores 9 to 13 indicate that the city and/or specific public space is experienced as 'not special'. Scores 14 to 16 represent 'pleasant'. A public space that scores an A on almost all key criteria will qualify as 'very pleasant'. This is an especially friendly public space that is bound to leave a good impression. It is a space where visitors will behave respectfully. They feel certain they will return in the future, and would certainly recommend the space to others. To do so it is crucial that the basic requirements (safety, functionality and maintenance) are met. If so, the three other criteria (Social use, Attractiveness and Sustainability) can provide a 'plus' in the tourist perception of public space.

Figure 4: method for 'intelligent' weighting of the various quality criteria and three examples of this



Source: PLAN terra BV (2016)

## 5. THE IMPACT OF ENGAGEMENT AND ACTIVE CIVIC PARTICIPATION ON THE FRIENDLINESS OF PUBLIC SPACES

The final rating a visitor gives a city after their visit is influenced by many different factors. Public spaces are a significant factor here. If the basic requirements have been met, the 'social quality' of the public spaces really can make the difference. A destination will be more appealing to visitors if its public spaces are vibrant, there are local markets, events are organised and there are plenty of places where visitors can sit and watch the world go by.

A destination may also have that 'added extra' in terms of visitor ratings if there are obvious signs that the city's residents and businesses are involved in and participate in 'their' public spaces. If they look after their public spaces like one big 'community garden' this will make a big impression on visitors. This may involve brightening up public spaces with plants and flowers or communal litter-picking, for example. Residents who act as hosts, welcoming visitors and giving them directions, can also make a very positive impression. Clearly, these signs of involvement and friendliness impact on the visual quality of the spaces but, far more importantly perhaps, they also affect visitors' behaviour and mindset. They sense that this is a place that people care about and are proud of. And this is a place that they as visitors will also treat with care and respect. I call this the "community garden theory", which is the counterpart of the "broken windows theory" (Wilson J. Q. & Kelling G., 1982). What's really good about this is that it can also prevent or significantly reduce any anti-social behaviour that tourists may inflict on residents of the city (Bennett T, Holloway K, Farrington D., 2008), (Blokland, T. 2009) (Leidelmeijer, K., 2012).

Examples of this can be seen the world over. In my view, the Netherlands has more of these examples than average, and the number has grown significantly in recent years. In many Dutch municipalities you see residents voluntarily improving public spaces and making them more 'their own' by establishing community gardens, jointly creating artworks for the public spaces, litter-picking, 'adopting' bins and creating what's app groups for local residents in an effort to make their neighbourhood a safer place to live. Just to give you an idea: in the city of Nijmegen, which has a population of around 164,000 people (Municipality of Nijmegen, 2016), there are 272 different projects where residents help manage the city's public spaces (PLAN terra BV, 2016). For example, more than 1400 primary school children litter-pick on a weekly basis in their local area in the city of Nijmegen and some surrounding municipalities (Wijkhelden, 2015). There are also a large number of national initiatives in the Netherlands that involve residents cleaning up their local area together and/or jointly organising community activities. Examples of these include national Keep it Clean Day, national Neighbours' Day etc. Every year, thousands of people take part in these initiatives (Nederland Schoon, 2014).

This kills two birds with one stone. One of the real benefits is that people come into contact with each other, which increases social cohesion and helps prevent loneliness, and local residents and visitors treat the environment with more respect. The "community garden theory" has proven its worth in the Netherlands for many years.

There are also examples of participation and involvement which focus even more on the central theme of this paper: city centre tourism. In Amersfoort city centre, for example, a group comprising primarily of older volunteers/pensioners takes visitors on boat tours of the city. In that same city there is a group of volunteers who perform plays in the city's historic centre, acting as residents of the city in the year 1600 (Waterlijn, 2016).

In the city of Delft, near The Hague, businesses involved in the hospitality sector in the city centre have joined forces to do something about safety on the streets on nights out. They've formed welfare teams who nip any aggressive behaviour between visitors on the street in the bud. There are also examples where residents take on the role of host,



welcoming visitors to city parks or city centres and answering any questions they may have. In Rotterdam, there are the City Stewards (Citystewards, 2016): Fifty or so young people who are finding it difficult to get a job or who are struggling with other issues. They are trained by the municipal authority to act as hosts and they also help clean up the city. In The Hague there's the 'Embassy of The Hague' (Ambassade van Den Haag, 2016): Two hundred and fifty enthusiastic volunteers who act as City Hosts, welcoming visitors during events. They are positioned at hot spots and tourist sites to answer any questions visitors may have about the city, the event or how to get from A to B.

The aim of these kinds of community initiatives is to make the city a better place to spend time in and live in, both for residents and for visitors. It helps visitors feel more 'at home' and can make for a really unique tourist experience. This welcome from residents can complement the welcome that is expected from taxi drivers and bus drivers, police officers, parking attendants and those involved in maintaining the city's public spaces.

## **6. EVERYONE'S A FRIEND OF THE VONDELPARK, AMSTERDAM**

The Vondelpark in Amsterdam is essentially the Netherlands' answer to Central Park, New York. Every year, more than ten million people visit the park (Municipality of Amsterdam, 2010). In recent years use of the park as a place to 'chill', BBQ or celebrate a birthday has rocketed. It's a really vibrant place right in the centre of Amsterdam. The average visitor is around 20 years old. Unfortunately, however, with this level of use, the park gets dirty. Every year visitors leave behind them a total of some 350,000 kg of waste, and, all too often, don't even bother to put it in the bin (Municipality of Amsterdam, 2013).

The amount of litter in the Vondelpark was becoming a major issue for local residents. On warm days, the huge number of people using the park for picnics and celebrations generated vast quantities of litter and there were also marks on the grass where their BBQs had been. At the start of the new millennium the litter problem in the Vondelpark was frequently in the news and the issue was high on the political agenda. "The huge amount of rubbish generated over the first warm weekend in spring 2011 was even reported in the national media. (Het Parool, 2011)"

For a long time the council tried to solve the problem by employing ever more people to clean up the mess. But the amount of waste and filth in the park just kept increasing. It was clear that this approach was not delivering the desired result in all respects. On peak days visitors left a mountain of litter in the park. The mess was cleared up by council workers the next morning but the outrage over the visitors' behaviour grew by the day. And at a time when cuts were being made in many areas there was no political will to deploy ever more manpower and spend ever more money to clean up the mess.

In 2012, in an effort to tackle the mess and the negative press it was generating, the council decided: "to encourage users to take responsibility for their use of the Vondelpark along the lines of: 'good host, good guest'. The city council and local residents, united under the Association of Friends of the Vondelpark, launched a new, integrated approach for a cleaner Vondelpark, which aimed to change the behaviour of visitors to the park, so that, even on busy days, the park would be a clean and attractive place for both residents and tourists. (Vrienden van het Vondelpark, 2016)."

One of the key factors here is encouraging people to be 'friends' of the park. Friends don't drop litter or make a mess and may even be prepared to roll up their sleeves and help clean up the park. If they use the park on a sunny day, on a night out or for a celebration of any kind, wherever possible, they would put their rubbish in the bin. Through four pillars (participation, management, enforcement and communication) the approach focuses more

than had previously been the case on preventive measures, such as visible cleaning, hosts and encouraging participation by volunteers, and on encouraging the desired behaviour through various means of communication.

This approach has now been in place for more than four years. Large numbers of local residents, businesses and staff from local hotels periodically help pick up litter, tend the gardens or act as hosts. This has made litter less of an issue. And, more importantly, satisfaction surveys among visitors indicate that they think the park is getting cleaner all the time (PLAN terra, 2014).

The latest development is a plan to involve tourists by offering them a remarkable 'excursion'. Visitors can support this civic initiative by actually 'giving a hand' with maintenance of the park.

I trust this approach, "Everyone's a friend of the Vondelpark", can offer inspiration for a strategy to make the public spaces used by tourists in the city centre even more welcoming.

Visitors who themselves make an active contribution to the friendliness of public spaces... it really is possible. I believe that a growing number of tourists are looking for a unique experience which really brings them into contact with local people and which, at the same time, allows them to do something in return for the welcome which they have received. This can help make people more tolerant and increase their understanding of other cultures and can also lessen the impact of any problems caused by visitors to your city.

## 7. CONCLUSION

Attractive public spaces are crucial for tourists. Public spaces have to meet some minimum requirements. They have to be safe, clean and functional. Attractive and sustainable design can influence the opinion of a tourist in a more positive way. But, in my view the criterion "social use" is the most important of all. Public spaces should have a pleasant social use to be attractive to tourists. They are vibrant and you find people that stroll, sport, play, sit and talk. This makes tourists to decide to come back again. The social quality can be improved even further when tourists feel welcome and 'at home' and they will behave according to that feeling. A 'nine plus' experience can be provided when tourists meet inhabitants of the city who voluntarily act as hosts of the city or who help improving the quality of public space by removing litter of nursing plants and flowers. This is a proof of the highest possible level of social quality and it makes 'friendly' public spaces. I call this the "community garden theory", which is the counterpart of the "broken windows theory".

In this paper I describe a new method of measuring of the integral quality of public space. In this method I also assume a correlation with the experience and associated conclusion of tourists; will I revisit this place ?. I believe civic participation can play a very positive role in this decision. In the case study of the Vondelpark I found some evidence for this.

But, it is clear more research is needed to validate the described method and the impact of civic participation.

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